Pathways to the Future

Market Analysis for the South Sandwich Village Center

March 2010

Prepared by

CENTER FOR POLICY ANALYSIS
UNIVERSITY OF MASSACHUSETTS DARTMOUTH

THE URBAN INITIATIVE
University of Massachusetts Dartmouth
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The Urban Initiative’s affiliation with the Center for Policy Analysis, a well-established research unit of UMass Dartmouth, is in keeping with the Center’s long-held desire to bring a greater focus on urban issues to their own policy work.

Among other elements, the Urban Initiative’s mission encompasses a fusion of research, project development and implementation, technical assistance, and policy analysis that supports the work of municipalities, state and local agencies, private and non-profit entities, and other organizations. Specifically, the Urban Initiative seeks to accomplish these goals by engaging our elected leaders, issuing research reports, hosting events and conferences, offering technical assistance and training to policy leaders, encouraging civic participation, and linking the University’s resources to the region and beyond.

Fields of Focus

- Economic Development
- Workforce Development
- Municipal Organization and Finance
- Leadership
- Urban Education
- Urban Policy
- Civic Engagement
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Executive Summary

The South Sandwich Village Center (SSVC), also known as the Golden Triangle, is a 298-acre mixed-use development that serves as a central marketplace for Sandwich residents. The SSVC is home to 130 acres of privately owned retail, restaurant, entertainment and professional office uses centralized in five primary plazas. The site also includes 54 acres of Town-owned property that is home to a Pop-Warner field, a skate park and an elderly and special needs housing complex and a 114-acre parcel, owned by the Massachusetts Department of Environmental Management and managed as preserved open space for wildlife habitat.

The Town’s 2009 Local Comprehensive Plan (LCP) designates the SSVC as a Strategic Planning Area (SPA) that has been targeted for development and/or redevelopment. The purpose of the SPA designation is to target development and/or redevelopment strategies in the SSVC so that the highest and best use of this site can be realized. The Town has indicated a desire to either expand current activities at the site, to find complimentary uses for the yet undeveloped portions of the site, or to redevelop the entire site to maximize its use.

Due to shifts in housing and real estate development over the past two years, the town retained the UMass Dartmouth Center for Policy Analysis and Urban Initiative to develop a market analysis of the SSVC to determine the types of businesses and industries that are the highest and best use for the development. This analysis undertakes the following tasks to meet this goal:

- A demographic profile and economic base analysis of Sandwich and the region that assesses the potential market opportunities and challenges and the local and regional economic position of the SSVC,
- A statewide electronic survey of commercial, industrial and professional businesses that measures the importance of various types of public infrastructure, workforce skills and other factors that determine a business’s willingness to relocate or expand to a particular location,
- An electronic and mail survey of current businesses in the SSVC that assesses their needs and ideas about future development,
- A literature review of village center redevelopment projects that summarizes the success factors of comparably sized city and town commercial zones,
- Key informant interviews that determine the needs of prospective businesses and that evaluate business and real estate opportunities for the SSVC, and
- Recommendations using findings and analysis that will enhance and guide economic development in the SSVC, particularly in regard to niche market opportunities.

Market Characteristics & Trends

Existing demographic and economic trends and characteristics have the greatest impact in determining market demand for various types of development. Accordingly, it is important to identify the market conditions in terms of population, employment, income, wages and other variables in Sandwich and its surrounding markets.

In assessing market demand, businesses often describe their customer base in terms of primary, secondary and tertiary market areas. These designations are essentially defined as the distance and time people are willing to travel to visit a particular development. The SSVC market areas are defined as the Primary Market Area (Town of Sandwich), the Secondary Market Area (the towns of Bourne, Falmouth and Mashpee) and the Tertiary Market Area (towns beyond the secondary market area).

Demographic Analysis

Historical Population

Sandwich’s population grew significantly throughout the last four decades. The town’s population growth rate since 1980 is more than double that of Barnstable County and the secondary market and more than eleven times the statewide increase. While population growth has slowed due to the recession and rising home prices, the town’s high quality of life, location to major highways, historical character, good public schools and environmental beauty will continue to make the town attractive and growth will likely continue once economic conditions improve, albeit at a slower pace.

Population Cohorts

The median age in Sandwich is 40.5 years, which is lower than the median age county-wide (46.2 years) but above the statewide median (38.5 years). While Barnstable County has one of the oldest median ages in New England, the percentage of residents age 65 years of age and older in Sandwich is less than half that of the county. This is primarily a result of the town’s location close to Routes 3 and 25 and its resulting attraction to commuters. It is also reflected in the percentage of households with children; 40.1 percent of Sandwich households have children under the age of 18, which compares to 25.0 percent in the secondary market, 24.5 percent in Barnstable County and 32.3 percent statewide.
Educational Attainment

A community’s level of educational attainment is an important factor in determining development opportunities because an educated population is likely to have higher incomes and possess skills that are attractive to certain types of employers (e.g., high-tech). Sandwich residents age 25 and older are more educated than the secondary market, the county, and the state as a whole: 48 percent of Sandwich residents age 25 and over have at least a Bachelor’s degree, which compares 37 percent for the secondary market, 42 percent for the county, and 38 percent statewide. This may be a result of the town’s relatively higher percentage of commuters who work in the high-tech and financial sectors of Greater Boston.

Income and Wages

The incomes of Sandwich residents are high and increasing, which translates into greater purchasing power in the market area. Per capita incomes in Sandwich are higher than the secondary market, county, and state levels, although they have increased at a slightly lower rate since 2000. Sandwich also has the highest median household income among the four groups, which has increased by 30.8 percent since 2000. Despite its high income levels, Sandwich has the lowest average annual wage among the secondary market, county, and state: average annual wages in Sandwich were $38,480 in 2008, 6.2 percent below the secondary market average wage of $41,038, 0.9 percent below the county average wage of $38,844 and 47.6 percent below the statewide average of $56,784.

Housing

While affordable housing is an issue statewide, the issue may be even more pronounced on Cape Cod as the supply of affordable and moderately priced housing for year-round Cape residents shrinks. Housing prices in Sandwich and on Cape Cod grew faster than the state even though wages are significantly lower in these areas; the average home price in Sandwich increased by 114 percent from 1987 to 2009, compared to 137 percent in the secondary market, 117 percent in Barnstable County and 88 percent statewide. Compounding the housing affordability issue in Barnstable County, but to a lesser extent in Sandwich, is that more homes are being purchased by seasonal residents, which further reduces the housing supply.

The Sandwich Local Comprehensive Plan estimates the potential of 2,696 additional housing units at final build-out. Rising housing costs may increasingly result in new homes being filled by more affluent retirees or second homeowners once economic conditions improve, and thus the affordable housing issue in Sandwich may become even more salient as the town increases its residential stock.

Economic Base Analysis

It is important to understand the Sandwich and Barnstable County economies because economic factors greatly influence the type of development that will be successful in the SSVC. Cape Cod is a unique region in Massachusetts because more than half of its economic base depends on the hospitality industry, retirees, second-home owners and Cape and Islands residents who work in other parts of the state (Commonwealth of Massachusetts 1993). It is estimated that six million tourists visit Cape Cod each year and that nearly two-thirds (65%) of all visitors to the Cape arrive in the summer and early fall months. When the effect of indirect and induced impacts is calculated, the resort industry generates as much as 40 percent of the region’s total employment.

Largest Employment Sectors

The structure of Sandwich’s economy generally parallels that of the county as a whole. The town’s two largest employment sectors are services, with 31 percent of total employment, and retail trade, with 30 percent of total employment. Both Sandwich and Cape Cod are characterized by small businesses; approximately 92 percent of all Cape businesses have less than 20 employees and 10.6 percent of Sandwich employees and 12.3 percent of Barnstable County employees are self-employed, which compares to an average of 6.5 percent statewide (U.S. Census 2000).

Largest Industries within the Major Sectors

Sandwich does not have any strategic or niche industries that account for significant levels of employment. The largest of the major industries in Sandwich is elementary and secondary schools, although employment growth in this industry is likely to level off in light of flattening K-12 enrollments. In terms of employment growth, merchant wholesalers and professional and technical services (e.g., lawyers, architects, and engineers) are the fastest growing of the major industries in Sandwich. Employment growth in professional and technical services is primarily fueled by increases in architectural services/engineering and management consulting. Importantly, the fastest growing major industries in Sandwich also pay the highest wages.

Professional/Technical services also include legal services, and although growth in legal services is small, the industry is likely to expand more quickly as the Sandwich and Cape populations age and the demand for legal services increases. Similarly, while nursing/residential care facilities and ambulatory health care services posted only small employment gains from 2001 to 2008, these industries will likely lead employment growth in Sandwich and county-wide as the population ages and more retirees and second homeowners move to the area.
Key Informant Interviews

The research team conducted a number of key informant interviews across a variety of categories to gather relevant and contextual information. The research team interviewed a wide variety of persons in a range of categories: experts in general real-estate and business development and planning, specialists in development for specific industry and business sectors, individuals with a contextual knowledge of Cape Cod, Sandwich and its place in the regional economy, and persons with an intimate knowledge of the SSVC as it exists today.

There was general consensus that the vision currently embraced by the town for the SSVC is the correct one, particularly given the current nature and conditions at the site, but that achieving this vision will be a difficult and challenging process. Given the current market conditions and its location on Cape Cod, where population has been slowing and aging, several stakeholders suggested that a development of this type must be accomplished incrementally and that current infrastructure and permitting challenges stand in the way of a quick and easy solution.

Many interviewees suggested that the SSVC’s lack of sewer and wastewater infrastructure is a major barrier to attracting development. Additionally, access to the Cape in general and SSVC in particular, due to the bridges, traffic and limited roadway access from Rt. 6, limits development potential. Internal roadways and the roads surrounding the site pose some issues but are not seen as insurmountable problems.

The lack of existing broadband infrastructure was also identified as a major barrier to development, since it limits the type of businesses that would seek to locate at the SSVC, especially in the site’s office space. While the problem of creating unlimited access to bandwidth is beyond the scope of the town, Sandwich should be prepared to insure immediate “last mile” access to the SSVC once the basic service is extended to Cape Cod as part of its approach to marketing the site to developers as a unique and ready-to-go opportunity.

There was significant support for the notion of an “anchor” to mitigate any developer’s potential risk. In particular, the site would be well-suited for an expansion of medical services and as the home of a training and development center for young entrepreneurs. Such an anchor-type development need not be designed specifically as an incubator, although a developer could design it as such. Its role as an anchor is envisioned more as an opportunity to provide “traffic,” which in turn creates “spinoff” activity and a strong partnership for further development.

Several stakeholders suggested that the town would need to be very aggressive in reducing potential infrastructure costs to developers and limiting their exposure to the permitting and mitigation costs imposed by the Cape Cod Commission or other entities. The town should do all it can to secure grant or other funding to make the site as shovel-ready as possible and should work to pre-permit the site to minimize mitigation costs or, at least, identify potential costs in advance so that there are no unpleasant surprises that could derail development and cost both the town and potential developers precious time.

Most stakeholders expressed support for a strategy that encourages multiple uses at the site and particular support for the civic and recreational aspects of the town’s Local Comprehensive Plan. There was also clear agreement that the need and market for the professional and technical services identified in the report, such as legal, financial planning, medical and, to a lesser extent architectural, engineering and high-tech, would grow and allow for the marketing of office space commensurate with the development.

Lastly, it was clearly stated to the team that the town will need to act decisively, if conservatively, in taking steps to prepare and market the site. The town must give the SSVC a clear identity and manage the marketing process with a defined brand and clarity of purpose and vision. It may be in the town’s best interest to turn the development and marketing task over to an EDC (Economic Development Council) type entity with the ability to devote time, resources and expertise to the project.

Market Opportunities & Challenges

Any major changes to the SSVC should be made in context of the current market. There are several market drivers and constraints that will impact any development/redevelopment efforts in the SSVC, outlined below.

Market Drivers

The appeal for new investment is driven by many factors:

- Available land for redevelopment, particularly the 54 acres owned by the Town.
- Specific design elements for the SSVC included in the 2009 Local Comprehensive Plan.
- Future population growth in both Sandwich and the region, particularly among retirees with high disposable incomes.
- Relatively high incomes of Sandwich residents, who are the primary customers of the SSVC.
- Developable/Re-developable properties are primarily owned by two owners, both of whom have interest in development/redevelopment opportunities.
• Sandwich is a desirable place to live, which is beneficial to any housing component that might be included in the SSVC as well as to businesses wishing to locate on the Cape.
• SSVC is targeted as a Strategic Planning Area in the Local Comprehensive Plan.
• SSVC is perceived as one of the centers of town.
• Successful without tourist traffic - services, stores and businesses are focused on meeting the needs of local and nearby residents, rather than relying on out-of-town business, somewhat reducing the traffic imprint.
• Limited land available that is zoned commercial in Sandwich, thus future competition from other local developments not a major factor.
• Proximity to Otis Air Force Base and the development potential that exists at that location.
• Proximity to Routes 6 and 28, which is appealing to residents, commuters, visitors and consumers.
• Significant number of residential properties in close proximity to the SSVC.
• Location of SSVC is close enough to off-Cape regions of Massachusetts to expand its market and utilize a more diverse workforce.
• The Town is already host to the growing medical facilities sector.

Market Constraints
There are constraints that act to limit development within the SSVC, including:

• Significant public wastewater mitigation costs required by local, regional and state laws. These costs may be too large to be borne by developers and it will be difficult for the town to pay for these improvements without private sector partnerships. Similarly, expensive internal and external transportation improvements are needed that effectively link the surrounding community.
• Perceptions of complicated local permitting process, which is characteristic of many Cape communities.
• Balancing economic development with quality of life, that is, how much new development are Sandwich residents willing to support and what types?
• Weak identity of the SSVC as a cohesive development.
• Not a destination development, that is, there are not many significant anchors that draw customers from beyond the primary market.
• Traffic issues plague the Cape Cod region as a whole, particularly in the summer months. Due to sporadic bridge construction, this issue sometimes concentrates in the Sandwich area.
• Limited employment within Sandwich, therefore reducing the number of possible out-of-town employees who might frequent the SSVC before, during, or after work.
• Proximity to Mashpee Commons and other local retail commercial developments limits overall potential retail development.
• Short-term residential growth may be slow due to high property and housing costs and possible rezoning.
• Poor visibility of the development from adjacent roadways. For example, the state-owned land blocks the view from Route 130 (and offers no access from the west) and the opposite side of the development is hidden from the roadway by trees and foliage. While the town may covet setbacks and design that hides the SSVC and makes the area more attractive, it does not provide easy sight lines for potential customers who are not familiar with the SSVC.
• Future development of the Massachusetts Military Reservation might attract visitor trips currently made to the SSVC.
• Local workforce issues within the context of the larger Cape-wide “brain drain” of young, educated talent.
• Current lack of a dedicated economic development entity to handle development for the town.
• SSVC distance from the highway and its limited retail constrains its use for tourism and hospitality activities.
• Current lack of high capacity/fiber optic service for data transmission and storage.

Development and Design
The research team conducted an analysis of the survey results and the key informant interviews to determine the market for certain development types at the SSVC. The analysis assesses various business and industry sectors as well as the need for other services, such as civic, recreational, and housing components, that will provide the Town with information necessary for it to plan for the future of the site. Much of what the research team found was consistent with the Local Comprehensive Plan, with an expansion of some of the concepts in that Plan as well as additional specifics about what might be possible and the challenges that must be faced.

There was qualified support for a mix of expanded retail and the creation of office space to meet the needs of an expanding population in both Sandwich and the secondary market. The office space could be utilized by those professional and technical services that match current local workforce skills such as accounting and financial planning, legal and medical services. These fields fit well with the type of office space envisioned for a village center and will be supported by a growing, but aging population. Medical office space, as differentiated from medical facilities that provide rehabilitation or outpatient services, could be an important component, allowing a
concentration of this sector rather than its current scattered site development throughout the region. Office space could also be utilized by small high-tech start-ups led by entrepreneurs trained locally and enticed to stay in the region. While the arts and creative economy type businesses do not have the capacity to drive the need for retail and office space, this sector could also utilize space available for advertising and architectural-type services.

Recommended expansion of retail should not include any of the big box variety stores but, rather, should be comprised of small to mid-sized retail operations designed to capture the growing market in Sandwich and the secondary market, while recapturing some of the Sandwich market that shops elsewhere.

Expanded retail and office markets, in and of themselves, do not appear sufficient in providing adequate revenue for a private developer or municipal/quasi-public agency to fully develop the SSVC to its highest potential. Therefore, the research team is recommending consideration of an anchor tenant that would minimize the development risk and provide the necessary foot traffic and confluence of activities to support and complement the expanded retail and office sectors. The presence of a medical/rehabilitation facility or an educational/entrepreneurial training facility could provide just such an anchor and do so within the context of the rest of the SSVC.

Our analysis determined that the SSVC is not a particularly good fit for industrial uses or even light industrial facilities. Companies producing products have concerns about bringing their product to market and the village center concept is not appealing to them from the perspective of having neighbors that might object to their production operations. The nearby Sandwich Industrial Park holds the potential to handle an increase in such activity within the town’s borders.

There also did not appear to be a market for the development or expansion of sectors regarding communications, bio-technology development and manufacturing, and back-office operations. While environmental firms might seem a good fit for any Cape Cod location, their presence closer to sites with direct access to water, particularly in the marine industrial sector, did not allow for the SSVC to be an enticing alternative.

Tourism did not score well in any context for this site and would directly compete with other parts of the town that lend themselves more directly to those who visit Sandwich for that purpose.

The hospitality industries would also not be likely to consider investment in the SSVC to any degree unless the anchors were sufficiently strong to justify their presence. The lack of visibility from Route 6 dim the prospects of such investment further, even as it relates to high grade restaurant enterprises.

The current state of the housing market has weakened its development virtually everywhere, but it is expected to slowly recover over time on Cape Cod as well as other locations. In the short term, however, it is not anticipated that housing will be able to play a central role in the SSVC’s development. There could still be provisions made for housing to be developed at the site over time, but generally housing is the last component to be developed in village centers. Similar developments utilizing senior or assisted living housing concepts have not proven very successful. Sandwich might instead consider the development of workforce housing catering to residents needing quality housing in town whose jobs are necessary for the sustainability of the Sandwich economy.

The focus on entrepreneurs is not accidental. There is a Cape-wide effort to retain the region’s best and brightest. The combination of this strategy with the mentorship available within the current workforce in Sandwich which, as it ages out, will seek greater opportunities to work full and part time closer to home, could provide a unique situation for the Town to be a center for the training of the next generation of business leaders and entrepreneurs. The retail and office space to be developed in the SSVC could add additional training opportunities and be a place where young talent can grow under the tutelage of those with experience.

The use of significant portions of the property for civic and recreational uses is vital to the development of the remainder of the property. Town offices could be provided in a central location and the recreational aspects, combined with green spaces, would provide the appropriate atmosphere that allows the Town to truly consider this a village center, while taking nothing away from other locations within the community. Such municipal enhancements would add to the base of support needed to make the retail and office enterprises viable.
Taking into account these market opportunities and constraints along with the demographic and economic base analysis of Sandwich and surrounding markets, the consultants have identified the strengths and weaknesses of various types of development opportunities for the SSVC.

Any development and/or redevelopment effort in the South Sandwich Village Center will first have to address the significant wastewater, storm water and transportation mitigation costs. The SSVC is currently served by closed tank septic systems governed under the laws of Title V. While the nearby Forestdale School has additional capacity to treat wastewater generated by new development in the SSVC, the capacity is limited and is unlikely to be sufficient to handle wastewater from a significant level of development in the SSVC without costly expansion.

There is no easy or inexpensive solution to the wastewater issue, and it is unlikely that a private developer would willingly bear the costs for these improvements. In addition, the Town may not have the financial resources or will to support the construction of such infrastructure. For example, the Cape Cod Commission-imposed transportation mitigation costs for the 2005 private development proposal were approximately $4,000,000. This does not address wastewater and storm water mitigation costs, which are likely to be much higher than that amount.

The SSVC will certainly be more marketable if these issues are resolved before any new development is considered, meaning that the best strategy might be for small-scale commercial development that limits mitigation costs while the larger mitigation issues are addressed, perhaps using federal funds. The Town’s 2009 TIGER grant application is one step toward addressing the transportation issues. Nearly all of the successful development projects reviewed for this study relied on strong public-private partnerships to solve these issues.

In addition, if the South Sandwich Village Center is to be pedestrian, biker and automobile friendly, while creating an architecturally pleasing design that fits in to the historical character of the town, then significant commercial development may be contrary to that vision. The success of the village center developments that were reviewed for this report hinge on the public uses, open space and local retail demand and usually do not include large commercial uses.

While the research team believes that the town has correctly settled on the village center approach, and that such an approach fits well within the town’s history and culture and gives the town a unique opportunity in comparison to other Cape Cod and New England communities, analysis of markets suggests that the town will have to expand beyond the usual approach taken in the development of such centers and that creating a retail and service sector that reaches beyond the borders of the town is vital. It is believed this will validate the significant planning and preparation that has already been accomplished by the town.

There will need to be heavy doses of both persistence and patience in the development of this site, and the town will need to work with a developer who is opportunistic and flexible in seeking to take advantage of rapidly changing conditions and circumstances. Any plans to significantly develop the SSVC will need to be designed with a view toward the long term, as infrastructure challenges are significant and may dictate a slower pace of development than first envisioned.

### Recommendations & Action Steps

1. In planning for future development, the Town should focus efforts on introducing a more diversified retail marketplace that meets local consumer demands for particular products or services they must go elsewhere to obtain. Doing so will also ensure that the SSVC has additional revenue-generating establishments that can help to support development efforts in the SSVC.

2. Given the Town’s Local Comprehensive Plan, development at the SSVC should reflect the ultimate vision for the site as a village center with the goal of providing services that serve both local consumers and the wider regional market.

3. The Town should work closely with the Cape Cod Commission to identify all possible permitting and development mitigation issues germane to the SSVC to ensure a site that is ready for more rapid development, affords developers a clear understanding of what to expect and establishes the SSVC, as much as possible, as a pre-permitted site. In engaging in this effort, the Town should explore all possible options that might facilitate greater ease in navigating the permitting and development process, including the possibility of expedited permitting procedures.
4. Given the nature of current state and national economic challenges, the Town will have to approach the development of the SSVC with a long-term view that identifies immediate, intermediate and more distant development objectives that will ensure a gradual pace for achieving the Town’s goal of realizing the “highest and best use” for the SSVC.

5. The Town should consider the establishment of an Economic Development Corporation and transfer responsibility for the development of the SSVC to this entity.

6. In addition to retail, the Town should pursue the creation of office space for financial planning firms, legal services, architectural firms and possibly small-scale high-tech start-up companies for which there will be demand.

7. To complement further commercial development in the SSVC, the Town should also consider the preservation of sufficient space to accommodate for civic uses that provide green space, which supports the vision for the SSVC as a true village/town center.

8. The development of the office and retail sectors within the SSVC will only happen with the support and inclusion of a credible partner that can serve as an anchor to the entire site. Doing so will minimize the perceived risk that some developers might have relative to investment in the SSVC. Given the demographic changes that the town will experience and the trends in employment on the Cape, credible partners can include those who provide medical, rehabilitation, or outpatient services or those who develop office space for medical services, as well as a university that might develop space for a college-sponsored entrepreneurial training program or new business incubation.

9. Given the existence of various centers for economic, commercial and industrial activities in the town, officials should consider the compartmentalization of the Historic Downtown District and Industrial Park for specific uses that set them apart from the SSVC and will allow the SSVC to develop a distinct identity.

10. The town should seriously consider the allocation of resources for the development of a comprehensive marketing plan for the SSVC that can attract prospective developers and businesses and raises an awareness of the particular identity that the Town wishes to portray for the SSVC’s development.

11. To ensure the continued viability of existing businesses and those that might locate in the SSVC in the future, as well as to attract new development opportunities, the Town should implement measures that will afford the SSVC greater visibility from Cotuit Road, Quaker Meetinghouse Road, and particularly at the SSVC’s northern boundary where Route 130 and Cotuit Road intersect.

12. To foster development, the Town will need to begin concerted and collaborative efforts to resolve on-site and off-site traffic concerns, wastewater issues and the lack of access to broadband capacity. The level of density sought cannot be supported without a solution to wastewater removal. In addition, the Town may consider working with prospective developers to share transportation/traffic mitigation costs that might otherwise deter projects from moving forward. In attempting to alleviate these issues, the Town may have to consider bonding, explore possible grants such as MORE grants offered through the state’s Executive Office of Housing and Economic Development and/or the implementation of a District Improvement Financing (DIF) project.

13. Housing, particularly workforce housing, can be a part of the SSVC’s future development, but given the current conditions in the housing market, the Town may not be able to realize the creation of additional units for another 10 to 15 years.

14. In working with opportunistic developers, the Town should endeavor to provide sufficient flexibility to meet the needs of these firms as a way to establish long-term development partnerships that can strengthen the SSVC.

15. To achieve the redevelopment of the SSVC for its “highest and best use,” the Town should consider the possibility of incentivizing upgrades to private properties within the SSVC that incorporate the design desired by the community’s vision for the site as a village center.

16. The existence of state preservation lands in the western portion of the SSVC can present itself as a potential challenge or opportunity. Given the proximity of the Town’s developable land to this protected area, Town officials should work with their counterparts at the state level to adequately ensure that this proximity will not pose a potential barrier to future development efforts and for particular uses that the Town might seek to introduce in that area. As an opportunity, this state land could provide support to the development of housing units on the Town’s land should the state allow for passive recreational activities such as walking/nature trails.
1.00 Introduction

The South Sandwich Village Center (SSVC) is a 298-acre mixed-use development that serves as a central marketplace for Sandwich residents. The SSVC is home to retail, restaurant, entertainment and professional office uses centralized in five primary plazas. There are also Town-owned facilities in the district and a 114-acre parcel owned by the Massachusetts Department of Environmental Management (DEM).

The Town’s 2009 Local Comprehensive Plan (LCP) designates the SSVC as a Strategic Planning Area (SPA) that has been targeted for development and/or redevelopment. The purpose of the SPA designation is to target development and/or redevelopment strategies in the SSVC so that the highest and best use of this site can be realized. The LCP envisions the SSVC as a mixed-use, smart growth development with internal connecting roadways and walkways that better link the various components of the site.

The Town has indicated a desire to either expand current activities at the site, to find complimentary uses for the yet undeveloped portions of the site, or to redevelop the entire site to maximize its use. The town is also willing to invest in infrastructure including water, sewer and limited access roadways, although the town does not have the financial resources to develop this infrastructure at the present time.

The 2009 South Sandwich Village Center TIGER Grant Application, in which the town proposes to build an internal access road and make associated transportation improvements for the SSVC, acknowledges that “since the 1980s, the Town has recognized the need for a coordinated, long-term approach to the redevelopment of the SSVC that would provide for additional tax revenues. The Town has also recognized the importance of protecting the environmentally sensitive rural and historic areas outside the SSVC. However, the land use patterns and types of retail development currently seen in SSVC were seemingly built without any coordinated planning efforts” (Town of Sandwich, 2009b).

Due to shifts in housing and real estate development over the past two years, the Town retained the UMass Dartmouth Center for Policy Analysis and Urban Initiative to develop a market analysis of the SSVC to determine the types of businesses and industries that are the highest and best use for the development. This analysis undertakes the following tasks to meet this goal:

- A statewide electronic survey of commercial, industrial and professional businesses that measures the importance of various types of public infrastructure, workforce skills and other factors that determine their willingness to relocate or expand to a particular location,
- An electronic and mail survey of current businesses in the SSVC that assesses their needs and ideas about future development,
- A demographic profile and economic base analysis of Sandwich and the region that assesses the potential market opportunities and challenges and the local and regional economic position of the SSVC,
- A literature review of village center redevelopment projects that summarizes the success factors of comparably sized city and town commercial zones,
- Key informant interviews that determine the needs of prospective businesses and evaluates business and real estate opportunities for the SSVC, and
- Recommendations using findings and analysis that will enhance and guide economic development in the SSVC, particularly in regard to niche market opportunities.

2.00 Description of the Town of Sandwich

Incorporated in 1639, Sandwich is the oldest town on Cape Cod and one of the oldest towns in the United States. The town has a population of 23,000 (U.S. Census American Community Survey, 2006-2008 estimates) and is the third largest town on Cape Cod in terms of land area, encompassing approximately 44 square miles. The town is bordered by Cape Cod Bay on the north, Barnstable to the east, Falmouth and Mashpee to the south and Bourne to the west. The northwest corner of the town sits directly on the Cape Cod Canal and approximately 15 square miles (9,600 acres) of the Massachusetts Military Reservation also lie within the confines of Sandwich. The Town is approximately 15 miles west of Hyannis, 57 miles southeast of Boston, 61 miles east of Providence, Rhode Island and 242 miles from New York City.

The economy of early Sandwich largely revolved around agriculture, fishing, and trading. In 1825, Demis Jarving opened the Sandwich Glass Manufactory, which produced colorful lead-based glass products utilizing the rich resources of the area. This was a staple of the Sandwich economy until its closing in 1888 due to workers’ union disputes. During this time, railroad construction and marine related businesses were the town’s primary industries. The marine economy boomed in the years after the War of 1812, with workers being employed in various aspects including whaling, fishing, deep-water travel, coastal freights and packet ships. The discovery of gold in California added another market in the area of deep-water shipping, spurring a growth in the number of clippers built. By the 1920s cranberries had become a popular sector in the local agricultural industry, in spite of a drastic reduction in local farming, and remain one of Cape Cod’s major exports.
3.00 South Sandwich Village Center

3.10 Physical Description

The South Sandwich Village Center (SSVC) area, also known as the Golden Triangle, is a 298-acre site located approximately 6 miles from the Sagamore Bridge and 2 miles from Route 6 at the intersection of three main traffic routes: Route 130, Cotuit Road and Quaker Meetinghouse Road in South Sandwich (see maps right).

The South Sandwich Village Center includes five primary plazas: Tradewinds Plaza, Canterbury Plaza, Heritage Plaza, Marshland Plaza and the Stop & Shop Plaza. The SSVC also includes a town-owned Pop-Warner field, a skate park and Hansen Village, an elderly and special needs housing complex owned by the Sandwich Housing Authority. A 114-acre parcel, owned by the Massachusetts Department of Environmental Management (DEM) and managed as preserved open space for wildlife habitat, lies directly adjacent to the proposed SSVC development area. The Town of Sandwich currently owns 54 acres on the site, with 130 acres privately owned and 114 owned by the DEM (see Figure 2). The site includes 73 parcels and 297,229 square feet of building area.
3.20 Real Estate Inventory

The SSVC includes a mix of commercial uses, led by food and beverage, retail and services. The SSVC generally has a lower percentage of retail uses in comparison to many similar mixed-use developments. The various commercial uses are not concentrated or located by particular type, but are instead scattered across the multiple plazas within the SSVC.

Table 1

<table>
<thead>
<tr>
<th>SSVC Commercial Inventory</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Beverage</td>
<td>18</td>
</tr>
<tr>
<td>Retail</td>
<td>18</td>
</tr>
<tr>
<td>Personal Services</td>
<td>17</td>
</tr>
<tr>
<td>Medical</td>
<td>14</td>
</tr>
<tr>
<td>Finance, Insurance &amp; Real Estate</td>
<td>12</td>
</tr>
<tr>
<td>Business Services</td>
<td>7</td>
</tr>
<tr>
<td>Amusement/Recreation</td>
<td>5</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
</tr>
<tr>
<td>Total</td>
<td>95</td>
</tr>
</tbody>
</table>

3.30 Development History

Much of the development in the South Sandwich Village Center has occurred incrementally over the last 25 years without a cohesive architectural or transportation plan. Since the 1980s, the town has recognized the need for a coordinated, long-term approach to the redevelopment of the SSVC that would provide for additional tax revenues while also protecting the environmentally sensitive rural and historic areas outside the area. The LCP notes that the land use patterns and types of retail development in the SSVC were built without any coordinated planning efforts. This incremental form of development has led to the construction of individual access driveways to the main roads surrounding the SSVC, many of them close to their neighbors, creating confusion and safety concerns for residents and consumers entering and leaving the commercial establishments. The 1996 Master Plan developed for the town identified the SSVC as a significant economic development center in need of a more coordinated development plan that would address these concerns.

In 2004, the town solicited bids for the sale and development of a 54-acre, town-owned parcel in the SSVC to jump-start economic growth in the area. In 2005, the town accepted a $6,000,000 bid for the development of this parcel from a group of private developers. At that time, the developers proposed the construction of a mixed-use development that included:

- 160 residential units including single-family homes, townhouses, and an elderly housing complex.
- Up to 200,000 square feet of commercial development, including a fitness center and pool, a physical therapy center, a tennis facility, retail stores and offices.
- Civic facilities including land for a new Town Hall and a senior center located on a village green. The developers offered to build the exterior shell of the senior center as part of their bid.

The town worked closely with the development team to bring the project to fruition, including working to change applicable local zoning requirements and evaluating wastewater management opportunities for both the 54-acre parcel and the SSVC as a whole. Possible solutions were developed for most of these issues.

However, all towns on Cape Cod are subject to the jurisdiction of the Cape Cod Commission, a regional planning and regulatory authority that has the statutory authority to review developments of this scale as Developments of Regional Impact (DRIs). The Commission is responsible for developing a Regional Policy Plan for Barnstable County every five-years which sets Minimum Performance Standards for all developments with a

Figure 2
South Sandwich Village Center

1 Excerpts from the South Sandwich TIGER Grant application, 2009.
regional impact. The Commission’s Regional Policy Plan was adopted in 1991 and revised in 1996, 2002 and 2009. The Regional Policy Plan does not change or alter any existing local, state, or federal regulations, but establishes regional performance standards in addition to existing regulations.

The Commission’s minimum performance standards for transportation and stormwater/wastewater management became an impediment for the 2005 proposal. The Commission requires that applicants offset the traffic impacts of their project through road improvements, purchase of open space to offset traffic generation from other properties in the area, or the payment of cash to allow the Commission to fund improvements. The cost for the transportation improvements and mitigation associated with the 2005 proposal was estimated at $4,800,000. Given the changing economic climate from 2007 to 2008, the developers were unable to commit to these improvements and declined to proceed with the project.

During this period, Tedeschi Realty, Inc. proposed a mixed use project that included a supermarket on a nearby parcel within the SSVC. While local and regional approvals for the project were obtained, they were conditioned on the completion of over $2,000,000 in transportation improvements to be paid by the developers and the project never materialized. Again, a combination of a poor economy and the cost of the traffic mitigation requirements led the developers to abandon development plans.

### 3.40 Local Comprehensive Plan Guidelines

The 2009 Sandwich LCP includes a conceptual design for the future development of the SSVC that addresses future development challenges. The conceptual design is the product of a 3-day public design workshop where design team members worked with the community to prepare concept plans, perspective drawings and graphic images.

The goal of the design recommendations is to “develop land use patterns, architectural styles, and streetscapes that are generally consistent with the traditional and historic development patterns of Sandwich and Cape Cod,” while promoting “economic development in this area [to] increase employment and housing opportunities and thereby strengthen the town’s tax base” (Town of Sandwich, 2009b).

The SSVC conceptual plan emphasizes mixed uses and new site design criteria, including the creation of internal connecting roadways and walkways. The build-out analysis conducted by the town and the Commission indicates a 30-year development potential in the SSVC for an additional 458 residential units, 540,670 square feet of additional commercial development and 110,000 square feet of additional civic space, resulting in approximately 30 acres of potential developable land. However, the LCP conceptual development plan indicates there are “ample” opportunities for infill development and redevelopment. Thus, future development in the SSVC is not constrained by the figures cited in the build-out analysis if the site is significantly redeveloped. Importantly, these goals are not static and meant simply as guidelines for any development or redevelopment in the SSVC.

Several key build-out goals for the SSVC identified in the LCP include:

- Civic uses including town facilities, services, and passive and active open spaces, including new public facilities (e.g. public safety building, town administrative building), a new senior center, an indoor recreation facility, a branch library, ball fields and a town green. The LCP estimates that these developments would result in 110,000 square feet of new civic space.
- Residential development consisting primarily of condominiums, townhouses, garden apartments, congregate living facilities and a continuing care facility.
- An estimated 540,670 square feet of new commercial space with retail, restaurant and entertainment predominately on the ground floor and office and residential uses above. Specifically, the concept for commercial space includes:
  - High quality office space focusing on financial, legal, health care services and possibly education facilities such as a corporate training center,
  - High-technology, or light-clean/industrial and business uses such as environmental, communications, biotechnology and back office within the restrictions of the town’s water recharge area regulations,
  - Retail stores that focus on the surrounding neighborhoods as the primary market such as the grocery store, restaurants, hardware and lumber, and
  - Entertainment opportunities such as a movie theater, bowling alley, arts center and high quality sports facilities.

The LCP also envisions the following type of development and design principles:

- Recreational facilities should be expanded and better connections should be made to the Pop Warner field, Oak Crest Cove, DEM conservation lands and new fields and facilities,
Higher density, higher quality and a vertical mix of uses are desired in the SSVC. Uses should include various types of retail, restaurant, professional offices and services, institutional and public uses and residential (varied types and income levels).

- New housing (from market rate to basic work force) should be the predominate upper floor use for new mixed use development as well as moderate density residential uses (i.e. townhouses, garden apartments and congregate housing) in the fringe areas of the SSVC.

- Future public uses should include an educational component such as a museum, a new branch library and new senior center.

- Light industrial and office uses (such as back office uses) should be considered in the mix of uses in the SSVC.

- A new Municipal Campus should be considered at the southeast corner of the Quaker Meetinghouse and Cotuit Road intersection. This is town-owned land (Oak Crest Cove) and may include a new Sandwich administrative building and safety complex containing the police department, fire department and rescue, and

- Businesses of “necessity” that local residents use on a regular basis such as the grocery store, restaurants, hardware, and professional services should be the primary commercial uses in the SSVC.

The LCP conceptual plan underscores the need for zoning amendments that emphasize mixed uses and new site design procedures, such as the creation of internal connecting roadways and walkways. To address these transportation issues, the town submitted a TIGER grant application in 2009 to obtain funds to construct transportation improvements, including:

- Construction of seven new entrances and associated connecting roads into the SSVC with appropriate site lines, allowing the closure of individual driveways to Cotuit Road.

- Development of a boulevard-style main entrance to the SSVC to facilitate the construction of a village green that will be the new center for civic activities in the town, and

- Application of access management principles to the proposed internal roads in an effort to minimize curb cuts, maximize safety, and maintain smooth traffic flow.
4.00 Market Characteristics & Trends

Existing demographic trends and characteristics have the greatest impact in determining market demand for various types of development. For example, a community with a high percentage of young professionals will have greater demand for entertainment venues, high-tech retail and the availability of Wi-Fi, whereas a retirement community might exhibit more demand for health care services, passive recreational opportunities and access to appropriate social service agencies. Accordingly, it is important to identify the market conditions in terms of demographics, housing stock, employment, income, wages and other variables to determine market demand for various types of development.

4.10 Primary, Secondary, & Tertiary Market Areas

Businesses often describe their customer base in terms of primary, secondary and tertiary market areas. These designations are essentially defined as the distance and time people are willing to travel to visit a particular development. The SSVC market areas are defined as follows:

Primary Market Area: The primary market area traditionally includes the area immediately surrounding a development that is less than a five to ten minute drive time from where customers live. The primary market for the SSVC is defined as the Town of Sandwich because the site draws the majority of its customers from this immediate area. Data from a survey of current businesses in the SSVC estimates that 60 percent of customers to the SSVC are from Sandwich. Because Sandwich residents make more frequent trips, the actual percentage of trips to the SSVC by Sandwich residents is likely much higher.

Secondary Market Area: The secondary market area includes three towns in the Upper Cape: Bourne, Falmouth and Mashpee. Although the SSVC primarily serves Sandwich residents, the SSVC also draws a number of its customers from these towns. Additionally, the SSVC may be able to increase the number of customers from the secondary market if the town pursues development in the SSVC that makes it attractive to a wider customer base. Responses offered during key informant interviews indicated a strong probability that the development of medical office, medical/hospital facilities, and/or rehabilitation services in the SSVC would penetrate into and absorb consumers from the secondary market area.

Tertiary Market Area: Includes towns beyond the secondary market area. It is unlikely that the SSVC will attract a significant number of customers from this area due to other choices available on Cape Cod. While some towns in Plymouth County are closer in distance than many towns on Cape Cod, it is unlikely that the SSVC would draw a significant number of customers from these areas due to traffic issues and the inconvenience of crossing the Sagamore Bridge.

Figure 3
SSVC Market Areas

4.20 Current Retail and Commercial Market

It is important to understand the retail and commercial market in which the SSVC competes. Historic downtown Sandwich is the only substantial retail or commercial area within a short drive of the SSVC, although this area does not offer many retail or commercial options that are not already contained within the SSVC. The larger Mashpee Commons, about a fifteen minute drive from the SSVC, offers larger and niche retail that attracts local and regional customers. However, Mashpee Commons does not offer the quick-trip convenience to Sandwich residents and most Sandwich residents will continue to do the majority of their shopping and everyday errands in the SSVC. There exist some larger developments a further distance from the SSVC, but again, these are not convenient for Sandwich residents.

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2 The exact primary trade area of the SSVC is difficult to determine because a database of actual customer addresses does not exist. A survey of customers should be considered to more accurately identify the SSVC market areas.
Future commercial and retail development may shift the market areas somewhat. For example, the Town of Sandwich is seeking to develop a mixed-use project in Forestdale, which is a short drive from the SSVC. The Massachusetts Military Reservation will also be developed and the Town of Bourne may redevelop some of its commercial areas. However, because the SSVC primarily draws its customers from the local area, the SSVC should continue to prosper, particularly in light of plans to improve the transportation infrastructure and expected population growth.

### 430 Population

#### Historical Population

Sandwich’s population grew significantly throughout the last four decades. The town’s population growth rate since 1980 is more than double that of Barnstable County and more than eleven times the statewide increase (see Table 2). Much of the growth was fueled by commuters to the Greater Boston area who were attracted to Sandwich’s quality of life, relatively lower housing costs and convenient location to Route 3 and Route 25. The extension of commuter rail to Kingston and Plymouth in the 1990s continued to make the area attractive to commuters as did the fly over and other roadway enhancements that were completed at the Sagamore Rotary in 2006.

Sandwich continues to be primarily a bedroom and retirement community with a lower level of second homeownership and tourist activity, especially when compared to the rest of the Cape. While population growth has slowed due to the poor economy and rising home prices, the town’s high quality of life, location to major highways, historical character, good public schools and environmental beauty will continue to make the town attractive and growth will likely continue once economic conditions improve, albeit at a slower pace.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandwich</td>
<td>8,727</td>
<td>15,489</td>
<td>20,136</td>
<td>21,295</td>
<td>144.0%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Secondary Market</td>
<td>41,214</td>
<td>51,068</td>
<td>61,827</td>
<td>66,568</td>
<td>61.0%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Barnstable County</td>
<td>147,925</td>
<td>186,605</td>
<td>222,230</td>
<td>222,118</td>
<td>52.0%</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>5,737,037</td>
<td>6,016,425</td>
<td>6,348,097</td>
<td>6,469,770</td>
<td>12.8%</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau, STF3 File and American Community Survey

#### Population Cohorts

The median age in Sandwich is 40.5 years, which is lower than the median age county-wide (46.2 years) but above the statewide median (38.5 years) [U.S. Census Bureau American Community Survey, 2006-2008 estimates].

While Barnstable County has one of the oldest median ages in New England, the percentage of residents age 65 years of age and older in Sandwich is less than half of the county (see Figure 5). This is primarily a result of the town’s location close to Routes 3 and 25 and its resulting attraction to commuters.

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1 Data for Barnstable County and Massachusetts is also provided for comparative purposes.
2 Approximately 13 percent of the housing units in Sandwich are seasonal (or occasional) units.
3 Data for the secondary market is not available.
A major challenge to the development of Sandwich - and Cape Cod and Massachusetts as a whole for that matter - is that young people are leaving the town, which is commonly referred as “brain drain.” For example, in 2000, 18 to 34 year olds accounted for 14.0 percent of the population in Sandwich, down from 21.8 percent in 1990.

The secondary market, Barnstable County and Massachusetts also experienced declines in this age cohort during this period (see Table 3). Individuals leave the region for a variety of reasons, which might include moving away to school or relocating for a new job or moving to a community with more affordable housing. These individuals are less likely to return to the area if there are no available jobs that match their skills or if housing is not affordable.

percent in Barnstable County and 32.3 percent statewide (see Table 4). Conversely, Sandwich has the lowest percentage of households with at least one member who is age 65 or older. Despite the fact that Sandwich has a high percentage of households with children, rising home prices may increasingly make Sandwich less appealing to families and more attractive to retirees and seasonal residents, who are less likely to have children.

Table 3

<table>
<thead>
<tr>
<th>Population Age 18 to 34</th>
<th>Year</th>
<th>1990</th>
<th>2000</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandwich</td>
<td></td>
<td>21.8%</td>
<td>14.0%</td>
<td>14.9%</td>
</tr>
<tr>
<td>Secondary Market</td>
<td></td>
<td>24.7%</td>
<td>16.6%</td>
<td>NA</td>
</tr>
<tr>
<td>Barnstable County</td>
<td></td>
<td>21.9%</td>
<td>14.8%</td>
<td>17.5%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td></td>
<td>30.1%</td>
<td>23.6%</td>
<td>22.9%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau STF3 and American Community Survey (2006-2008 estimates)

4.40 Household Characteristics

The ages of household members can be an important factor in determining the market potential of various types of commercial development and can be a guide for developing non-commercial uses such as parks and other entertainment options. Sandwich has a high percentage of households with children; 40.1 percent of Sandwich households have children under the age of 18, which compares to 25.0 percent in the secondary market, 24.5 percent in Barnstable County and 32.3 percent statewide (see Table 4). Conversely, Sandwich has the lowest percentage of households with at least one member who is age 65 or older. Despite the fact that Sandwich has a high percentage of households with children, rising home prices may increasingly make Sandwich less appealing to families and more attractive to retirees and seasonal residents, who are less likely to have children.

Table 4

<table>
<thead>
<tr>
<th>Household Characteristics</th>
<th>Area</th>
<th>Children</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandwich</td>
<td>40.1%</td>
<td>22.3%</td>
<td></td>
</tr>
<tr>
<td>Secondary Market*</td>
<td>25.0%</td>
<td>33.3%</td>
<td></td>
</tr>
<tr>
<td>Barnstable County</td>
<td>24.5%</td>
<td>36.8%</td>
<td></td>
</tr>
<tr>
<td>Massachusetts</td>
<td>32.3%</td>
<td>24.3%</td>
<td></td>
</tr>
</tbody>
</table>

*2000 Data

Source: U.S. Census Bureau STF3 and American Community Survey (2006-2008)

4.50 Educational Attainment

A community’s level of educational attainment is an important factor in determining development opportunities because an educated population is likely to have higher incomes and possess skill sets that are attractive to certain types of employers (e.g. high-tech). Sandwich residents age 25 and older are more educated than the secondary market, the county, and the state as a whole; 48 percent of Sandwich residents age 25 and over have at least a Bachelor’s degree, which compares 37 percent for the secondary market, 42 percent for the county, and 38 percent statewide (see Figure 6). This may be a result of the town’s relatively higher percentage of commuters who work in the high-tech and financial sectors of Greater Boston.
4.60 Race/Ethnicity

The population in Sandwich is less diverse than it is in the secondary market, Barnstable County and the state (see Table 5).

Table 5

<table>
<thead>
<tr>
<th>Ethnicity/Race</th>
<th>Area</th>
<th>White</th>
<th>Minority</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sandwich</td>
<td>97.6%</td>
<td>2.4%</td>
</tr>
<tr>
<td>*Secondary Market</td>
<td>94.4%</td>
<td>5.6%</td>
<td></td>
</tr>
<tr>
<td>Barnstable County</td>
<td>94.3%</td>
<td>5.7%</td>
<td></td>
</tr>
<tr>
<td>Massachusetts</td>
<td>84.5%</td>
<td>15.5%</td>
<td></td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau, 2000

4.70 Income & Wages

Income & Poverty

The incomes of Sandwich residents are high and increasing, which translates into greater purchasing power in the market area. Per capita incomes in Sandwich are higher than the secondary market, county and state levels, although they have increased at a slightly lower rate since 2000 (see Table 6). Sandwich also has the highest median household income among the four groups, which has increased by 30.8 percent since 2000.

As one might expect, Sandwich has lower levels of poverty than other areas of the county, which is an outcome of its relatively higher income and wage levels (see Table 7).

Table 6

<table>
<thead>
<tr>
<th></th>
<th>Per Capita</th>
<th>Median</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area</td>
<td>2000</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Sandwich</td>
<td>$26,895</td>
<td>$34,302</td>
<td>21.6%</td>
</tr>
<tr>
<td>Secondary Market</td>
<td>$24,306</td>
<td>$31,123</td>
<td>21.9%</td>
</tr>
<tr>
<td>Barnstable County</td>
<td>$25,318</td>
<td>$34,001</td>
<td>25.5%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>$25,952</td>
<td>$33,806</td>
<td>23.2%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau STF3 (2000), American Community Survey (2006-2008 estimates) and CFPA calculations

Table 7

<table>
<thead>
<tr>
<th>Poverty Levels</th>
<th>Area</th>
<th>Individuals</th>
<th>Families</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandwich</td>
<td>2.5%</td>
<td>1.9%</td>
<td></td>
</tr>
<tr>
<td>*Secondary Market</td>
<td>6.5%</td>
<td>4.9%</td>
<td></td>
</tr>
<tr>
<td>Barnstable County</td>
<td>6.0%</td>
<td>3.7%</td>
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<tr>
<td>Massachusetts</td>
<td>10.0%</td>
<td>7.1%</td>
<td></td>
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* 2000 Data

Source: U.S. Census Bureau STF3 data and American Community Survey (2006-2008 estimates)
Average Annual Wages

The resort industry has a significant impact on annual wage levels throughout the Cape, with earnings below statewide averages due to seasonal unemployment and the large number of jobs in low-wage service occupations. Average annual wages in Sandwich were $38,480 in 2008, 6.2 percent below the secondary market average wage of $41,038, 0.9 percent below the county average wage of $38,844 and 47.6 percent below the statewide average of $56,784 (see Table 8). However, wage data alone convey an overly pessimistic picture of residents’ economic situation, particularly for year-round residents. Much of the seasonal volatility and low-wage jobs are filled by students and temporary foreign workers, who migrate to the Cape and Islands during the resort season, specifically for temporary employment. Many seasonal jobs are also held by moonlighters, homemakers, and retirees, who supplement family income by working only during the resort season (Barrow, 2005).

For year-round residents, total personal income in Barnstable County (from all sources) compares favorably to the figures for the State as a whole.6 Per capita personal income for Barnstable County is $47,960 (2008), 97 percent of the statewide average of $48,995 (see Table 9).7 Personal income data also support the conclusion that the “retirement industry” has emerged as a significant regional export for the Cape and Islands that brings income into the region. This income, in turn, fueled much of the growth in the past decade among the region’s residential real estate, health care, construction, retail, financial services and professional services industries.

Table 8

<table>
<thead>
<tr>
<th>Area</th>
<th>2001</th>
<th>2008</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandwich</td>
<td>$29,952</td>
<td>$38,480</td>
<td>28.5%</td>
</tr>
<tr>
<td>Upper Cape</td>
<td>$32,113</td>
<td>$41,038</td>
<td>27.3%</td>
</tr>
<tr>
<td>Barnstable County</td>
<td>$31,044</td>
<td>$58,844</td>
<td>25.1%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>$44,980</td>
<td>$56,784</td>
<td>26.2%</td>
</tr>
</tbody>
</table>

Source: Massachusetts Executive Office of Labor & Workforce Development, ES202 Data

Table 9

<table>
<thead>
<tr>
<th>Personal Income Per Capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area</td>
</tr>
<tr>
<td>----------------------------</td>
</tr>
<tr>
<td>Barnstable County</td>
</tr>
<tr>
<td>Massachusetts</td>
</tr>
</tbody>
</table>

Source: U.S. Bureau of Labor Statistics

4.80 Housing

While affordable housing is an issue statewide, the issue may be even more pronounced on Cape Cod as the supply of affordable and moderately priced housing for year-round Cape residents declines. Housing prices in Sandwich and on Cape Cod grew faster than the state even though wages are significantly lower in these areas; the average home price in Sandwich increased by 114 percent from 1987 to 2009, compared to 137 percent in the secondary market, 117 percent in Barnstable County and 88 percent statewide (see Table 10). Compounding the housing affordability issue in Barnstable County, but to a lesser extent in Sandwich, is that more homes are being purchased by seasonal residents, which further reduces the housing supply.

Table 10

<table>
<thead>
<tr>
<th>Median Single-Family Home Prices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area</td>
</tr>
<tr>
<td>----------------------------------</td>
</tr>
<tr>
<td>Sandwich</td>
</tr>
<tr>
<td>Secondary Market</td>
</tr>
<tr>
<td>Barnstable County</td>
</tr>
<tr>
<td>Massachusetts</td>
</tr>
</tbody>
</table>

Source: The Warren Group Town Stats

The Massachusetts Department of Housing and Community Development estimates that as of November 2009, affordable housing units represented 3.6 percent of the town’s year-round housing stock. An additional 118 new affordable units have been approved but not completed and 61 additional affordable units have been proposed, which would raise the percentage of affordable units to 6.0 percent, below the state’s 10 percent threshold (Town of Sandwich 2010).

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6 Total personal income includes wages (ES-202) as well as income from all other sources, including pensions, Social Security, interest, dividends, rent, proprietor’s income, and capital gains.

7 Data at the town level is not available.
The Town of Sandwich estimates that there were a total of 9,287 housing units in 2007, an increase of 28.3 percent since 1980. Despite this increase, the Sandwich Local Comprehensive Plan estimates the potential of 2,696 additional housing units at final build-out. Rising housing costs may increasingly result in new homes being filled by more affluent retirees or second homeowners once economic conditions improve, and thus the affordable housing issue in Sandwich may become even more salient as the town increases its residential stock.

4.90 Commuting/Place of Work
The community in which employees work may impact the market potential for various types of development. For example, residents from other communities who work in Sandwich may frequent businesses in the SSVC, whereas Sandwich residents who work out of town may purchase goods and services from the community in which they work. Thus, an increase in development in the SSVC could potentially bring new workers to the area who will support current and new businesses. Formal recommendations that identify the specific types of development best suited to the SSVC are included later in this report, in the section entitled Market Opportunities & Challenges.

As noted, Sandwich is primarily a bedroom and retirement community. Not surprisingly, Sandwich residents have the longest average commute time of all towns on Cape Cod and the highest percentage of residents who use public transportation (U.S. Census Bureau, 2000) (see Table 11). The percentage of Sandwich residents commuting off-Cape to work increased from 7.2 percent in 1970 to 25 percent in 2000 (U.S. Census). In 2000, twenty-nine percent (29.0%) of the town’s workforce worked in Sandwich, 45.7 percent worked in other towns in Barnstable County and 25.3 percent worked off-Cape (see Table 12).

### Table 11

<table>
<thead>
<tr>
<th>Town</th>
<th>Average Commute Time</th>
<th>Use Public Transit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandwich</td>
<td>30.20</td>
<td>2.44%</td>
</tr>
<tr>
<td>Mashpee</td>
<td>29.55</td>
<td>1.25%</td>
</tr>
<tr>
<td>Bourne</td>
<td>28.06</td>
<td>1.31%</td>
</tr>
<tr>
<td>Eastham</td>
<td>26.43</td>
<td>0.76%</td>
</tr>
<tr>
<td>Falmouth</td>
<td>24.72</td>
<td>1.87%</td>
</tr>
<tr>
<td>Barnstable</td>
<td>23.68</td>
<td>1.64%</td>
</tr>
<tr>
<td>Brewster</td>
<td>21.74</td>
<td>0.42%</td>
</tr>
<tr>
<td>Yarmouth</td>
<td>21.38</td>
<td>1.68%</td>
</tr>
<tr>
<td>Dennis</td>
<td>21.24</td>
<td>0.91%</td>
</tr>
<tr>
<td>Harwich</td>
<td>21.22</td>
<td>1.05%</td>
</tr>
<tr>
<td>Wellfleet</td>
<td>20.75</td>
<td>0.38%</td>
</tr>
<tr>
<td>Truro</td>
<td>18.06</td>
<td>0.44%</td>
</tr>
<tr>
<td>Chatham</td>
<td>17.92</td>
<td>0.57%</td>
</tr>
<tr>
<td>Orleans</td>
<td>14.77</td>
<td>1.14%</td>
</tr>
<tr>
<td>Provincetown</td>
<td>13.41</td>
<td>0.00%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>26.96</td>
<td>0.09%</td>
</tr>
</tbody>
</table>

*Source: MassINC, Mass. Commuting*
5.00 Economic Base Analysis

It is important to understand the Sandwich and Barnstable County economies because economic factors greatly influence the type of development that will be successful in the SSVC. Cape Cod is a unique region in Massachusetts because more than half of its economic base depends on the hospitality industry, retirees, second-home owners and Cape and Islands residents who work in other parts of the state (Commonwealth of Massachusetts 1993). It is estimated that six million tourists visit Cape Cod each year and that nearly two-thirds (65%) of all visitors to the Cape arrive in the summer and early fall months. When the effect of indirect and induced impacts is calculated, the resort industry generates as much as 40 percent of the region’s total employment.

Cape Cod has begun to expand its economic base by spreading its resort economy into the “shoulder seasons” by adding and shifting growth in the hospitality industry from the summer season into the early spring and late fall (Cape Cod Commission 2002). This strategy has been moderately successful – measured in part by an increase in permanent tourism industry employment – but the need to diversify the region’s economy beyond the hospitality cluster remains (Barrow 2005a). Thus, economic development planners at both the regional and local level are working to shift new growth in the tourist economy into the shoulder seasons, while promoting the development of light-clean industries, such as health care, professional services and selected niches in high technology (Barrow et al. 2005b, 2005c). These industries generally provide high-wage jobs and have less impact on the environment than traditional manufacturing or other large facilities.

Sandwich is less reliant on the resort economy than other areas of the county, although it is experiencing many of the same development pressures. The structure of the economy in terms of the major industries and potential growth industries is a major factor in determining the type of development that will be successful in the SSVC. The specific potential growth industries that are most suitable to the SSVC based on these factors are detailed later in this report.

5.10 Largest Employment Sectors

The structure of Sandwich’s economy has generally paralleled that of the county as a whole. The town’s largest employment sectors are health care/social assistance (16.7% of total employment), accommodations and food services (16.4% of total employment), educational services (15.1% of total employment) and retail trade (13.8% of total employment) (see Figure 7). Both Sandwich and Cape Cod are characterized by small businesses: approximately 92 percent of all Cape businesses have less than 20 employees and 10.6 percent of Sandwich employees and 12.3 of Barnstable County employees are self-employed, which compares to an average of 6.5 percent statewide (U.S. Census 2000).

Note - Public Sector/Government employment is included in the various categories. For example, the Educational Services sector primarily includes public school teachers.

![Figure 7: Largest Employment Sectors, Town of Sandwich, 2008](image_url)
In terms of its largest four employment sectors, Sandwich has a lower level of employment in retail than the secondary market and Barnstable County as a whole, but above that of the state. Sandwich also has the highest level of educational services employment, which consists primarily of public school teachers (see Figure 8).

5.20 Largest Industries within the Major Sectors
Sandwich does not have any strategic or niche industries that account for significant levels of employment. The largest of the major industries in Sandwich is elementary and secondary schools, although employment growth in this industry is likely to level off in light of flattening K-12 enrollments (see Table 13). In terms of employment growth, merchant wholesalers and professional and technical services (e.g. lawyers, architects, and engineers) are the fastest growing of the major industries in Sandwich. Employment growth in professional and technical services is primarily fueled by increases in architectural services/engineering and management consulting. Importantly, the fastest growing major industries in Sandwich also pay the highest wages.

The professional/technical services industry also includes legal services, and although growth in legal services is small, the industry is likely to expand more quickly as the Sandwich and Cape populations age and the demand for legal services increases. Similarly, while nursing/residential care facilities and ambulatory health care services posted only small employment gains from 2001 to 2008, these industries will likely lead employment growth in Sandwich and county-wide as the population ages and more retirees and second homeowners move to the area.

Table 13

<table>
<thead>
<tr>
<th>Largest Industries by Employment</th>
<th>Sandwich</th>
<th>Massachusetts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary and Secondary Schools</td>
<td>662</td>
<td>742</td>
</tr>
<tr>
<td>Food Services and Drinking Places</td>
<td>567</td>
<td>632</td>
</tr>
<tr>
<td>Food and Beverage Stores</td>
<td>399</td>
<td>376</td>
</tr>
<tr>
<td>Professional and Technical Services</td>
<td>187</td>
<td>278</td>
</tr>
<tr>
<td>Nursing and Residential Care Facilities</td>
<td>237</td>
<td>238</td>
</tr>
<tr>
<td>Ambulatory Health Care Services</td>
<td>194</td>
<td>205</td>
</tr>
<tr>
<td>Specialty Trade Contractors</td>
<td>178</td>
<td>197</td>
</tr>
<tr>
<td>Merchant Wholesalers, Nondurable Goods</td>
<td>39</td>
<td>128</td>
</tr>
<tr>
<td>Services to Buildings and Dwellings</td>
<td>87</td>
<td>123</td>
</tr>
<tr>
<td>Amusement/Gambling/Recreation</td>
<td>139</td>
<td>119</td>
</tr>
</tbody>
</table>

Source: Massachusetts Executive Office of Labor & Workforce Development, ES202 2008 Data
5.30 Labor Force & Unemployment

The labor force is defined as working age individuals who reside within a particular community regardless of the location in which they work. Sandwich, Barnstable County and the state all experienced employment declines from 2000 to 2009, although Sandwich experienced the smallest percentage change among these groups (see Table 14). Sandwich is a net exporter of jobs; in 2009 there were 5,172 (2Q) jobs located within Sandwich, while the number of Sandwich residents who were employed was 10,482, a difference of 5,130 jobs. In other words, more than half of Sandwich residents are commuting daily to work, many to off-Cape locations, which impacts traffic and residents’ quality of life. Local development in the areas of professional and medical services may be one solution to providing more opportunities for Sandwich residents to work in town, which in turn will create additional demand for retail development in the SSVC.

The average annual unemployment rate in Sandwich is 7.9 percent (2009), which compares to a secondary market unemployment rate of 8.3 percent, a county-wide unemployment rate of 9.0 percent and a statewide unemployment rate of 8.4 percent. Because it is less dependent on the resort economy, the unemployment rate in Sandwich fluctuates less than it does county-wide. As Figure 9 demonstrates, average unemployment rates in Sandwich have been lower than the secondary market, Barnstable County and statewide averages throughout the business cycle.

5.40 Business Establishments

Sandwich added 80 net new business establishments between 2001 and 2008, a change of 15.3 percent. This compares to a change in business establishments of 9.9 percent in the secondary market, 6.1 percent in Barnstable County and 10.5 percent statewide (see Table 15).

Table 14

<table>
<thead>
<tr>
<th>Annual Average Employment, 2000 to 2009</th>
<th>2000</th>
<th>2009</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandwich</td>
<td>10,503</td>
<td>10,482</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Secondary Market</td>
<td>32,167</td>
<td>32,986</td>
<td>2.5%</td>
</tr>
<tr>
<td>Barnstable County</td>
<td>109,564</td>
<td>108,764</td>
<td>-0.7%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>3,273,292</td>
<td>3,180,717</td>
<td>-2.8%</td>
</tr>
</tbody>
</table>

Source: Massachusetts Executive Office of Labor & Workforce Development LAUS Data

Table 15

<table>
<thead>
<tr>
<th>Business Establishments</th>
<th>2001</th>
<th>2008</th>
<th># Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandwich</td>
<td>523</td>
<td>603</td>
<td>80</td>
<td>15.3%</td>
</tr>
<tr>
<td>Secondary Market</td>
<td>2,151</td>
<td>2,363</td>
<td>212</td>
<td>9.9%</td>
</tr>
<tr>
<td>Barnstable County</td>
<td>8,554</td>
<td>9,077</td>
<td>523</td>
<td>6.1%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>193,547</td>
<td>213,882</td>
<td>20335</td>
<td>10.5%</td>
</tr>
</tbody>
</table>

Source: Massachusetts Executive Office of Labor & Workforce Development, ES202 2008 Data

Figure 9

Unemployment Rates, 1995 to 2009

Source: Massachusetts Executive Office of Labor & Workforce Development, LAUS Data
5.50 Occupation
Sandwich residents generally mirror the county and the state in terms of their occupation, although the state has a larger share of construction occupations while Barnstable County has a larger share of production, transportation and materials moving occupations (see Table 16). Sandwich also has a higher percentage of management/professional occupations in comparison to the county and state, which is not surprising when one considers the town’s relatively high levels of education and income. This skilled workforce provides opportunities for the town to attract and develop many of the Cape’s growth industries, which are identified later in this report.

5.60 Tax Base
An important outcome of the development/redevelopment of the SSVC will be to increase commercial tax revenues to the town. In 2009, Sandwich received 4.9 percent of its tax revenue from commercial development, which is nearly four times less than the statewide average of 18.9 percent (see Figure 10). In fact, Sandwich receives the fourth lowest percentage of its tax revenues from commercial development on Cape Cod (see Figure 11). While commercial tax revenues in Sandwich have declined by 1.3 percent of total tax revenues since 2000, tax revenues from residential development increased by 6.9 percent of total tax revenues over this period.

5.70 Regional Industry Patterns
Although Sandwich is less reliant on the resort industry than the Cape and Islands as a whole, the town’s economy is nonetheless affected by regional industry patterns. An examination of growing and emerging industries in the region can provide direction in terms of the type of commercial development that is appropriate for the SSVC.

The Cape and Islands region includes several identifiable business clusters, which consist of firms in two or more related sectors that are linked together through customer, supplier, labor market, or other relationships. It is these clusters that drive and will continue to drive the Cape and Islands economies and that present

---

### Table 16

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Area</th>
<th>Sandwich</th>
<th>Barnstable County</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management/Professional</td>
<td></td>
<td>44.2%</td>
<td>42.0%</td>
<td>36.2%</td>
</tr>
<tr>
<td>Service</td>
<td></td>
<td>16.5%</td>
<td>16.3%</td>
<td>19.3%</td>
</tr>
<tr>
<td>Sales &amp; Office</td>
<td></td>
<td>27.1%</td>
<td>24.7%</td>
<td>25.7%</td>
</tr>
<tr>
<td>Farming/Fishing/Forestry</td>
<td></td>
<td>0.3%</td>
<td>0.2%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Construction/Maintenance/Repairs</td>
<td></td>
<td>7.4%</td>
<td>7.6%</td>
<td>12.2%</td>
</tr>
<tr>
<td>Production/Transportation/Materials</td>
<td></td>
<td>4.5%</td>
<td>9.2%</td>
<td>6.1%</td>
</tr>
</tbody>
</table>

Note: Data for secondary market not available

Source: U.S. Census Bureau American Community Survey (2006-2008 estimates)

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Figure 10

**Commercial Tax Revenues as a Percentage of Total Tax Revenues, 2009**

<table>
<thead>
<tr>
<th>Year</th>
<th>Sandwich</th>
<th>Massachusetts</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>6.2%</td>
<td>20.3%</td>
</tr>
<tr>
<td>2001</td>
<td>6.2%</td>
<td>20.9%</td>
</tr>
<tr>
<td>2002</td>
<td>5.9%</td>
<td>22.7%</td>
</tr>
<tr>
<td>2003</td>
<td>5.7%</td>
<td>20.0%</td>
</tr>
<tr>
<td>2004</td>
<td>5.4%</td>
<td>18.9%</td>
</tr>
<tr>
<td>2005</td>
<td>4.8%</td>
<td>18.4%</td>
</tr>
<tr>
<td>2006</td>
<td>4.7%</td>
<td>17.4%</td>
</tr>
<tr>
<td>2007</td>
<td>4.8%</td>
<td>17.9%</td>
</tr>
<tr>
<td>2008</td>
<td>4.3%</td>
<td>18.9%</td>
</tr>
<tr>
<td>2009</td>
<td>4.9%</td>
<td>18.9%</td>
</tr>
</tbody>
</table>

Source: Massachusetts Department of Revenue

---

Figure 11

**Commercial Tax Revenues as a Percentage of Total Tax Revenues, 2009**

Source: Massachusetts Department of Revenue
strategic opportunities for business development in Sandwich.

An analysis of ES202 employment data identifies five critical existing industry clusters and three emerging industry clusters in the Cape and Islands region. Sub-clusters were also identified within three of these major clusters. As Table 17 shows, the Hospitality cluster is the Cape and Island’s largest and accounts for more than one in five of the region’s jobs (20.7%). Other critical clusters include Health Services (12.6% of total employment), Construction (8.2% of total employment), Knowledge Intensive (6.8% of total employment) and Financial Services (3.7% of total employment).²

**Percentage Employment Change**

Six of the Cape and Islands’ eight major clusters experienced employment growth between 2003 and 2008. The highest percentage job growth occurred in Social Services (18.8%), Distribution (12.7%) and Health Services (10.9%), while the Knowledge Intensive (-0.3%) and Financial Services (-11.1%) clusters shed employment over this period (see Figure 12). The region experienced significantly higher levels of employment growth in the Construction, Distribution, and Social Service industry clusters in comparison to the state, while it lost a greater share of employment in the Financial Services cluster.

**Numerical Employment Change**

The Cape and Islands added a net total of 1,791 new jobs from 2003 to 2008 and is projected to add 4,177 jobs over the next five years (EMSI, 2009) (see Figure 13). Six of the region’s eight clusters added jobs from 2003 to 2008, with the highest number of jobs added in Health Services (+1,360 jobs) and Construction (+621 jobs). Conversely, employment in Financial Services declined by 510 jobs, which is likely the result of consolidation in that industry. Health Services is projected to add the most jobs in the next five years.

```
Table 17

<table>
<thead>
<tr>
<th>Sector</th>
<th>% of Total Employment</th>
<th>% Change 03-08</th>
<th>% Change 08-13</th>
<th>Avg. Earnings</th>
<th># Establishments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Critical Clusters</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hospitality</td>
<td>20.7%</td>
<td>2.6%</td>
<td>-1.8%</td>
<td>$23,389</td>
<td>3,141</td>
</tr>
<tr>
<td>Retail</td>
<td>6.9%</td>
<td>0.1%</td>
<td>-2.0%</td>
<td>$25,891</td>
<td>1,639</td>
</tr>
<tr>
<td>Food &amp; Drinking Places/Accommodations</td>
<td>13.2%</td>
<td>3.5%</td>
<td>-3.0%</td>
<td>$21,632</td>
<td>1,340</td>
</tr>
<tr>
<td>Arts &amp; Culture</td>
<td>0.6%</td>
<td>13.7%</td>
<td>26.5%</td>
<td>$28,671</td>
<td>162</td>
</tr>
<tr>
<td>Health Services</td>
<td>12.6%</td>
<td>10.9%</td>
<td>14.5%</td>
<td>$47,956</td>
<td>644</td>
</tr>
<tr>
<td>Construction</td>
<td>8.2%</td>
<td>7.4%</td>
<td>-0.8%</td>
<td>$48,125</td>
<td>1,818</td>
</tr>
<tr>
<td>Knowledge Intensive</td>
<td>6.8%</td>
<td>-0.3%</td>
<td>7.1%</td>
<td>$47,232</td>
<td>1,170</td>
</tr>
<tr>
<td>Educational Services</td>
<td>1.6%</td>
<td>6.1%</td>
<td>2.0%</td>
<td>$32,378</td>
<td>105</td>
</tr>
<tr>
<td>High Technology</td>
<td>1.6%</td>
<td>-10.9%</td>
<td>11.7%</td>
<td>$61,882</td>
<td>152</td>
</tr>
<tr>
<td>Professional Services</td>
<td>3.6%</td>
<td>2.3%</td>
<td>7.4%</td>
<td>$47,429</td>
<td>913</td>
</tr>
<tr>
<td>Financial Services</td>
<td>3.7%</td>
<td>-11.1%</td>
<td>-6.8%</td>
<td>$52,202</td>
<td>776</td>
</tr>
<tr>
<td><strong>Emerging Clusters</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marine Industry</td>
<td>2.6%</td>
<td>5.7%</td>
<td>-3.9%</td>
<td>$44,833</td>
<td>186</td>
</tr>
<tr>
<td>Marine Science &amp; Technology</td>
<td>1.3%</td>
<td>-6.9%</td>
<td>-10.1%</td>
<td>$56,648</td>
<td>29</td>
</tr>
<tr>
<td>Marine Services</td>
<td>1.3%</td>
<td>21.6%</td>
<td>2.0%</td>
<td>$33,508</td>
<td>157</td>
</tr>
<tr>
<td>Distribution</td>
<td>2.1%</td>
<td>12.7%</td>
<td>12.5%</td>
<td>$52,581</td>
<td>505</td>
</tr>
<tr>
<td>Social Services</td>
<td>2.0%</td>
<td>18.8%</td>
<td>23.1%</td>
<td>$25,932</td>
<td>181</td>
</tr>
</tbody>
</table>

Source: EMSI Covered Employment – 2nd Quarter 2009 v. 2
Dun & Bradstreet Imarket (For Several Industries in Marine Services Only).

²The Knowledge Intensive sector includes Educational Services, High Technology, and Professional/Technical Services.
five years (+2,010 jobs), while the Construction (-75 jobs) and Marine Industry (-114 jobs) clusters are projected to lose jobs over this period.

**Industry Opportunities For Sandwich**

The cluster analysis illustrates that while the region will continue to be driven by the resort economy, health services and knowledge intensive industries will grow considerably, particularly in medical, high technology and professional services (see Figure 13). These industries pay high wages and can provide jobs to Sandwich residents who currently commute to jobs outside of the town, while also providing opportunities for younger residents to remain in the area. The town's high educational levels and quality of life would be appealing to the development of these types of industries in the SSVC. In addition, these industries are in line with recommendations made in the Sandwich Local Comprehensive Plan.
6.00 Business Surveys

Two business surveys were conducted that measure the importance of various business location factors and business needs. The first survey was targeted to business on- and off-Cape and the second was administered to businesses located in the SSVC.

6.10 Survey of Cape Cod & Massachusetts Businesses

An electronic survey of businesses from a cross section of industries was conducted to measure the importance of various business location criteria. The survey also included specific questions about the South Sandwich Village Center, including what respondents consider the most attractive aspects of the development and if they would locate their business there. Invitations to participate in the survey were emailed to approximately 1,200 businesses through various professional and business organizations, including:

- The Cape Cod Canal Chamber of Commerce
- The Cape Cod Chamber of Commerce
- The Greater Fall River Chamber of Commerce
- The National Association Independent Office Properties
- The Massachusetts Bankers Association
- The Massachusetts Medical Device Association
- MassDevelopment
- The New Bedford Economic Development Council
- SouthCoast Development Partnership

A total of 79 surveys were returned, for a response rate of approximately 7 percent. The results follow.

Likelihood of Relocating

To measure differences in the importance of business location decisions between businesses that are likely to relocate and those that are not, respondents were asked if they are likely to relocate or open a new location in the next three years. Over forty-two percent (42.1%) report they are very likely or somewhat likely to relocate in the next 3 years (see Table 18). These businesses are represented evenly across the sample in terms of business size and type.

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Likely</td>
<td>18.4%</td>
</tr>
<tr>
<td>Somewhat Likely</td>
<td>23.7%</td>
</tr>
<tr>
<td>Somewhat Not Likely</td>
<td>15.8%</td>
</tr>
<tr>
<td>Not Likely</td>
<td>42.1%</td>
</tr>
<tr>
<td>Don't Know</td>
<td>18.4%</td>
</tr>
</tbody>
</table>

Table 18

How Likely is Your Company to Relocate or Open a New Location in the Next 3 Years?

<table>
<thead>
<tr>
<th># Employees</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;10</td>
<td>2.5%</td>
</tr>
<tr>
<td>11 to 25</td>
<td>40.7%</td>
</tr>
<tr>
<td>25 to 50</td>
<td>13.6%</td>
</tr>
<tr>
<td>50 to 100</td>
<td>8.6%</td>
</tr>
<tr>
<td>&gt;100</td>
<td>18.5%</td>
</tr>
</tbody>
</table>

Table 19

Number of Employees

<table>
<thead>
<tr>
<th>Industry Category</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>26.4%</td>
</tr>
<tr>
<td>Other</td>
<td>15.3%</td>
</tr>
<tr>
<td>Finance, Insurance &amp; Real Estate</td>
<td>12.5%</td>
</tr>
<tr>
<td>Retail</td>
<td>6.9%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>5.6%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>5.6%</td>
</tr>
<tr>
<td>Mail order/Internet Sales</td>
<td>5.6%</td>
</tr>
<tr>
<td>Art</td>
<td>2.8%</td>
</tr>
<tr>
<td>Consulting</td>
<td>2.8%</td>
</tr>
<tr>
<td>Legal</td>
<td>2.8%</td>
</tr>
<tr>
<td>Non-Profit</td>
<td>2.8%</td>
</tr>
<tr>
<td>Transportation</td>
<td>2.8%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>2.8%</td>
</tr>
<tr>
<td>Back Office</td>
<td>1.4%</td>
</tr>
<tr>
<td>Education</td>
<td>1.4%</td>
</tr>
<tr>
<td>Public Utility</td>
<td>1.4%</td>
</tr>
<tr>
<td>Tourism/Recreational Services</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

Over a quarter of businesses (26.4%) are in the manufacturing sector, with smaller percentages representing other business sectors (see Table 20). “Other” businesses include those involved in conservation, environmental engineering, sales, service, advocacy, software and television production.
Criteria/Factors In Selecting A New Location

Most Important Business Location/Relocation Criteria

Respondents were asked to list three to five of the most important criteria they would evaluate in selecting a new site and/or building (not specific to the SSVC). Responses were varied and are presented below, with highway access/easy access to the site (N=17) and location (N=10) cited as two of the three most important criteria. Due to traffic issues surrounding the SSVC and in the Cape as a whole, this result suggests that the location of the SSVC may not be an asset in attracting new business development. The problems of traffic and location specific to the SSVC were also echoed in many of the key informant interviews discussed later in this report.

- Available employment pool/Skilled labor (N=11).
- Location (N=10).
- State of the art building/LEED (N=10).
- Taxes/fees (N=9).
- Cost of doing business/Operating costs (N=9).
- Land/Development/Building cost (N=6).
- Local/government support (N=4).
- Parking (N=4).
- Telecommunications infrastructure (N=4).
- Access to water supply/Water (N=3).
- Local demographics (N=3).
- Ease of permitting (N=2).
- Established community (N=2).
- High traffic area/traffic count (N=2).
- Location proximity to a City/Downtown (N=2).
- Real estate values/prices (N=2).
- Road system (N=2).
- Sewer (N=2).
- Utility cost (N=2).
- Visibility (N=2).
- Ability to be a manufacturing plant.
- Access to technology partners.
- Amenities.
- Tax breaks (e.g. TIFS, DIFs).
- Available market segment.
- City leadership on renewable energy.
- Closeness to international airport.
- Concentration of manufacturing businesses.
- Cost structure in the geography.
- Market demand.
- Handicapped accessible.
- Industrial area.
- Infrastructure-gas.
- Proximity to my home.
- Neighborhood.
- Other businesses in a demographic location.
- Professional quality space.
- Proximity to services.
- Size of space.
- Strategic impact.
- Suitability to our office functions.
- Waterfront.

Figure 14
Importance of Factors in Selecting a New Location
Rating of Business Location/Relocation Criteria

There are many factors that a business considers when choosing a new location, including the availability of land, infrastructure, proximity to markets, ease of permitting, tax incentives and the quality of life in the area.

Respondents were asked to rate the importance of various business relocation factors on a 1 to 5 scale, with one meaning not important and five meaning critically important\(^{10}\). The most important factors reported by respondents are a well developed broadband infrastructure (4.2 average), followed by quality of life in the community (3.9 average), low local commercial/industrial tax rate (3.6 average), ease of permitting and regulatory procedures (3.5 average) and the proximity to a major city (3.4 average) (see Figure 14, previous page). The least important factors reported are proximity to freight rail (1.8 average), proximity to a major airport (2.4 average), proximity to a 4-year college or university (2.6 average), proximity to similar businesses (2.6 average) and proximity to commuter rail (2.7 average). The results are similar regardless of business size, industry category, or whether or not a business is planning to relocate or expand in the next 3 years.

While Sandwich provides an excellent quality of life for its residents (rated second in importance), the town is at a disadvantage in many of the most important factors rated by respondents. For example, the Cape and Islands region has seen limited investment in broadband infrastructure (rated top relocation factor) in comparison to other regions of the state, the town is not proximate to a major city (rated 5th most important relocation factor) and the permitting and regulatory system on Cape Cod can be difficult (rated fourth most important relocation factor). It should be noted that the non-profit OpenCape Corporation was recently awarded a $32 million Broadband Technology Opportunity Program (BTOP) grant by the National Telecommunications and Information Administration (NTIA) as part of the American Recovery and Reinvestment Act (ARRA) stimulus funds. The $32 million BTOP grant will be combined with matching funds totaling $8 million from the Commonwealth of Massachusetts, RCN Metro Optical Networks and Barnstable County to construct a comprehensive middle mile network to support the economic, educational, public safety, and government needs of the Southeastern Massachusetts Region.

\(^{10}\)All respondents were asked this question regardless of whether or not they plan to relocate or expand.

\(^{11}\)Percentages do not add to 100 percent because respondents were able to choose more than one category.

\(^{12}\)3.2 percent of respondents sell to other markets.

Modes of Transportation

Traffic congestion is an issue for the SSVC and businesses that rely heavily on truck transportation are not a good fit for the area. Respondents indicate they most frequently use trucks (44.4%) and automobiles (40.7%) to bring inputs and ship finished products to their customers (see Figure 15\(^{11}\)). Although smaller businesses that rely on trucks may not have a major traffic impact in the SSVC area, larger manufacturers would have a significant traffic impact. In addition, 64.1 percent of respondents report that is important for their business to be near its target market (see Table 21).

Table 21
Is it Important for Your Business to Be Near Your Target Market?

<table>
<thead>
<tr>
<th>Percent</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>64.1%</td>
</tr>
<tr>
<td>No</td>
<td>32.8%</td>
</tr>
<tr>
<td>Not Sure</td>
<td>3.1%</td>
</tr>
</tbody>
</table>

Site-Specific Questions

Would You Locate in the South Sandwich Village Center?

Businesses that are planning to relocate or expand were asked if they would consider locating in the SSVC\(^{12}\). Nearly eighteen percent of (17.7%) indicate they would consider locating in the SSVC, while 40.3 percent would not locate in the SSVC and 41.9 percent are not sure (see Table 22). The businesses that would consider locating in the SSVC described their business type as finance (N=4), retail (N=4), manufacturing (N=2), mail order (N=1) and tourism (N=1).

Table 22
Would You Consider Locating in the SSVC?

<table>
<thead>
<tr>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Not Sure</td>
</tr>
</tbody>
</table>
Businesses that indicate interest in locating in the SSVC were asked which characteristics or factors make the SSVC attractive to their business. Responses include location (N=8), size of development (N=3), demographics of the area (N=3) and proximity to other opportunities (N=1). The amount of land that these businesses would need ranges from a low of .25 acres to 1 acre. In terms of building space, needs range from a low of 750 square feet to 2,000 square feet.

**Why Would You Not Locate Your Business at this Site?**
Respondents who report they would not locate in the SSVC were asked to provide a reason(s) why they would not locate there. Responses include:

- Traffic congestion (N=8).
- Cape Cod too isolated (N=6).
- Too far from where I live (N=6).
- Not close enough to our existing client base (N=5).
- Already have locations in the vicinity (N=2).
- Key employees do not live near the Cape (N=2).
- Not enough industry (N=2).
- Too far from current location (N=2).
- Not near major transportation hub.
- Limited pool of human resources.
- Coastal insurance issues.
- Strip-mall type space is not good for my business.
- Outside our service area as a hospital.
- Staff lives off-Cape and would not want to relocate.
- Too small a community.
- Cost of living in the area.
- We want to stay in a city, near large hospitals.
- Permitting process excessive.

**Future Relocation or Expansion in SSVC**
Among businesses who are not planning to relocate or expand, 34.6 percent indicate they would consider locating in the SSVC if there was ever a future need to relocate or expand, while 30.8 percent would not consider the SSVC and 34.6 percent are not sure (see Table 23). Only 3.1 percent of businesses who would not consider locating in the SSVC in the future would consider locating there if the site were developed differently, for example, if it were developed with big box retail establishments (see Table 24).

### Table 23
**Would You Consider Locating in the SSVC in the Future?**

<table>
<thead>
<tr>
<th></th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>34.6%</td>
</tr>
<tr>
<td>No</td>
<td>30.8%</td>
</tr>
<tr>
<td>Not Sure</td>
<td>34.6%</td>
</tr>
</tbody>
</table>

### Table 24
**Would You Consider Locating in the SSVC if it Were Completely Redeveloped or Developed Differently?**

<table>
<thead>
<tr>
<th></th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>3.1%</td>
</tr>
<tr>
<td>No</td>
<td>75.0%</td>
</tr>
<tr>
<td>Not Sure</td>
<td>21.9%</td>
</tr>
</tbody>
</table>

### Additional Comments
Businesses were asked to provide additional comments. These include:

- Availability of capital important.
- Biggest fear for medium/large scale employer like myself would be getting enough employees and turnover of labor over time.
- I enjoy having a business in Sandwich and would definitely consider SSVC if the look of the space available wasn’t as “retail” looking as it currently is. I do like the convenient highway access, just a little too commercial for my needs.
- I think the ‘Golden Triangle’ should be built out as commercial area and not residential.
- Summer traffic would be an issue for potential businesses.
- The traffic on Cape Cod is an extreme impediment to any business involved in shipping/delivery.

6.20 Survey of South Sandwich Village Center Businesses
Ninety-eight surveys were hand delivered to current SSVC businesses to assess their opinions and ideas about future development. These businesses were provided the option of completing the survey online or returning the survey by business reply mail. Follow-up calls were made to increase the response rate. A total of thirty surveys were completed, for a response rate of 30.6 percent.

**Business Types**
Respondents were asked to indicate the number of people they employ and their industry category. The majority of replying businesses are small, with 46.7 percent having less than 5 employees and 23.3 percent having 6 to 10 employees (see Table 25).

### Table 25
**Number of Employees**

<table>
<thead>
<tr>
<th># Employees</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;5</td>
<td>46.7%</td>
</tr>
<tr>
<td>6 to 10</td>
<td>23.3%</td>
</tr>
<tr>
<td>11 to 25</td>
<td>13.3%</td>
</tr>
<tr>
<td>25 to 50</td>
<td>0.0%</td>
</tr>
<tr>
<td>50 to 100</td>
<td>10.0%</td>
</tr>
<tr>
<td>&gt;100</td>
<td>6.7%</td>
</tr>
</tbody>
</table>
Forty percent of responding businesses (40.0%) are in the business services industry, followed by smaller percentages in other industries (see Table 26).

### Table 26

<table>
<thead>
<tr>
<th>Industry Category</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Services</td>
<td>40.0%</td>
</tr>
<tr>
<td>Finance, Insurance &amp; Real Estate</td>
<td>13.3%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>13.3%</td>
</tr>
<tr>
<td>Medical</td>
<td>10.0%</td>
</tr>
<tr>
<td>Other</td>
<td>10.0%</td>
</tr>
<tr>
<td>Personal Services</td>
<td>6.7%</td>
</tr>
<tr>
<td>Other</td>
<td>6.7%</td>
</tr>
</tbody>
</table>

**Customer Location**

Responding businesses attract 59 percent of their customers from Sandwich, 28 percent from other areas of Cape Cod and 13 percent of their customers from off-Cape (see Figure 16). Because Sandwich residents make more frequent trips than customers who live farther away, the actual portion of trips to the SSVC by Sandwich residents is likely much higher. Approximately 14 percent of customers from Sandwich work in the SSVC or the nearby Sandwich Industrial Park.

### Figure 16

**Where Do Your Customers Live?**

- 59.0% Sandwich
- 28.0% Cape Cod
- 13.0% Off-Cape

**Future Plans**

While results show there will be some turnover in the SSVC in the coming years, the majority of responding businesses plan to remain in the SSVC; 90 percent plan to be in the SSVC in 1 year, 82.8 percent plan to be in the SSVC in 3 years and 72.4 percent plan to be in the SSVC in 5 years (see Table 27).

### Table 27

<table>
<thead>
<tr>
<th>Do You Plan on Being in this Location In:</th>
<th>1 Year</th>
<th>3 Years</th>
<th>5 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>90.0%</td>
<td>82.8%</td>
<td>72.4%</td>
</tr>
<tr>
<td>No</td>
<td>0.0%</td>
<td>10.3%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Not Sure</td>
<td>10.0%</td>
<td>6.9%</td>
<td>20.7%</td>
</tr>
</tbody>
</table>

**Types of New Development**

Respondents were asked the type(s) of new development in the SSVC that would be beneficial to their business. Responses are varied and include:

- More retail (N=7).
- Professional offices (N=5).
- Town buildings/Civic uses (N=6).
- Medical offices (N=2).
- Athletic fields.
- Auto repair.
- Big box retailers (e.g. Walmart, Target).
- Activities for kids & teens.
- Coffee shop.
- Good restaurant.
- Senior housing.
- More open space/A public park.
- Package Shippers.
- Business services.
- Recreational building to attract youth.
Major Challenges in Attracting New Development

Respondents were asked what they believe are some of the major challenges in attracting new development to the SSVC. Results include:

- Wastewater and stormwater issues (N=4).
- Cape Cod Commission regulations (N=3).
- Traffic (N=3).
- Increasing foot traffic (N=2).
- Seasonality of the Cape (N=2).
- Signage (N=2).
- The town management.
- Tax breaks.
- Space.
- Permitting process.
- Parking.
- No Starbucks.
- Zoning.
- Local tax rates.
- Too many of the same businesses.
- General economy.
- The town of Sandwich as a whole is not welcoming to new businesses.
- Historical town makes development difficult.

Additional Comments

Additional comments include:

- Bringing businesses into Sandwich is not a priority.
- Most of our customers in Sandwich and on the Cape don’t even know we are here.
- Permitting is daunting.
- Tie the developments together with internal vehicular access.
- Town does not support retail uses.
- Town management.
- Town should embrace retail, could easily compete with Mashpee Commons.
7.00 Literature Review & Case Studies

A literature review was conducted to examine strategies that other communities have employed in developing mixed-use town and village centers. The review also identifies peer projects and case studies that provide more specific examples of successful development and redevelopment efforts.

7.10 General Overview

A review of recently developed town and village centers identifies several common elements. First, the development focus of these projects is on creating a vibrant community center that creates a "sense of place" or "brand identity." In order to achieve this sense of place, these centers primarily focus on mixed-use development with a combination of retail, professional, open space, housing (primarily townhouses and condominiums) and civic uses, which is similar to the vision for the SSVC proposed in the Sandwich Local Comprehensive Plan. Combining these uses allows the town or village center to function as the "center of town," similar in many ways to the urban downtowns of yesteryear. By making the village center a destination, it is possible to turn quick trips into longer stays, creating a mixed-use environment where residents can "work, live and play."

A common development strategy is to create business-customer synergy by establishing an array of commercial and retail establishments that draw shoppers and visitors to the area, which are in turn supported by an established market of primary customers drawn from the village center’s residential units and surrounding neighborhood. The synergy is achieved by including retail shops intermixed with service providers and restaurants that encourage visitors to stay once their immediate business is completed. This business mix is supported by a focus on walkways, pedestrian access and roadway interconnections. Centralized parking also encourages visitors to walk past stores, increasing the likelihood of customers stopping and making purchases. The presence of restaurants and cafes also encourage visitors to plan their trips around meal times, allowing them to fulfill several needs on the same trip.

A majority of town or village centers are anchored by a large grocery or retail establishment, such as a major bookstore or big box store, which may or may not be appropriate for the SSVC. Other village centers have promoted the development of "destination restaurants," typically a well-established and popular franchised/chain establishment. Both of these strategies focus on drawing individuals to the town or village center, at which point other techniques and strategies can be utilized to encourage them to remain there. Importantly, by focusing on retail and service-based businesses, the village center is able to survive and thrive, while at the same time ensuring that the needs of local consumers are met.

Open space is also an essential characteristic of successful town and village centers. Attractive non-commercial development encourages visitors to spend more time at the village center, further increasing their chances of indulging in a coffee, snack or other impulse purchase. Examples include a "village green" or park with large tracts of open space, which may include fountains, walking paths and dog parks.

The inclusion of civic buildings is also a defining characteristic of a town or village center and these uses create strong connections with the community. Ideally, a town center integrates a significant civic anchor, such as a community center, library or town hall. These uses create an increase in traffic while also enhancing the area’s sense of place, that is, the development becomes a public center for community life and not just a place to shop.

Another key to the success of town and village centers is the inclusion of roadway interconnections that facilitate movement within the town and village center while providing easy access from outside roadways for autos, pedestrians and bicyclists. Successful roadways work to tie in the surrounding neighborhood to the town/village center by increasing access and making that access user-friendly to autos and pedestrians. Limiting the number of access points from surrounding areas, while once a best practice among new town/village center developments is now considered a poor method to increase customer traffic.

An important distinction that should be understood is mixed-use versus multi-use development. A true mixed-use development is fully integrated in terms of having multiple uses (e.g. retail, office and residential) in the same building. Multi-use development, on the other hand, includes these same uses, but they are not physically connected to each other. For example, residential areas may be in walking distance of the retail or professional office spaces, but they are not physically integrated into those buildings. An advantage to multi use rather than mixed type development is that it eliminates the complications often associated with the phasing and construction of traditional mixed-use projects, since different uses have different rates of absorption (Urban Land Institute 2008).

---

13 Big box stores such as WalMart, Target, and CostCo usually have between 10,000 to 20,000 square feet.
7.20 Peer Projects

The literature review identified comparable peer communities and commercial developments that provide specific examples of successful village center redevelopment projects. While Sandwich possesses a relatively unique set of economic and demographic characteristics in terms of its mix of residents (retirees, commuters, and families), isolated location, New England charm and tourism component, five peer communities and commercial developments were identified, each one similar to Sandwich and the SSVC by either setting, size, or local market characteristics. While the characteristics and demographics of these peer communities vary widely, the lessons learned are uniform and are similar to many of the challenges and opportunities faced by the SSVC. These peers include:

- Mount Rainier, Maryland, a town of approximately 10,000, home to a mixed-use town center (MUTC) serving as a downtown for adjacent communities,
- Rockville, Maryland, a city of approximately 60,000 whose village center serves both local and county residents,
- Sammamish, Washington, a city of approximately 35,000 that recently underwent a redevelopment of its town center to create a “new heart of the city,”
- Addison, Illinois, with a population of approximately 36,000, a city whose town center is becoming “the centerpiece of the community,” and
- New Albany, Ohio, a small village whose village center is seen as “the key to long-term success for the Village” as a whole.

Four of the five peers are home to a town or village center similar to the SSVC. Examining each site’s Town Center Plan or Master Plan reveals several recurring themes, all of which are tied directly to the potential success or failure of a village center. Foremost among these themes is the need for a healthy mix of retail, services and restaurants to attract a local population capable of sustaining the center’s economic activity. A town or village center should evolve into the densest and most diverse part of a community, with strong connections to its surroundings, similar to urban downtowns of the past (Urban Land Institute, 2008).

Each village center is located near or within an established residential area. This allows the center to serve as the primary destination for shopping trips, social activities and restaurant visits, as well as to provide a stable core of customers. Although the tenor and timbre of each community is different, they are largely comprised of older, single-family houses with few unoccupied properties. These nearby neighborhoods are home to potential customers with high disposable incomes and an inclination to engage the services provided by the nearby village centers. The importance of local consumers is paramount. Of the five peer communities identified above, only New Albany lacks an established residential population. Because of this, New Albany’s village center has experienced difficulty in attracting new businesses and many of the businesses located in the area have struggled.

Another important element exemplified by the peers is that they maintain a focus on truly mixed-use development. Village centers are typically located in small cities or large towns and are designed to serve the needs of local patrons. Consumers are drawn to locations where they can meet several needs at once, and this philosophy is at the core of the village center. By combining retail and service establishments with entertainment venues and restaurants, the village center can draw and maintain a substantial consumer base. The intermixing of municipal offices and traditional office space provides another incentive for consumers to visit the village center.

A third theme, and perhaps the most important, is the recognition that while village centers can attract customers from throughout the region and those from nearby neighborhoods, they are not always equipped or capable of competing with large-scale retail destinations. A village center is typically not capable of competing with a shopping mall, because it lacks the wide range of retail establishments that draw consumers to the mall. Big box retail is also rarely successful, as the village center lacks the vast tracts of surface parking required to support them. Village centers often (but not always) lack the ability to draw large numbers of consumers from nearby communities on a regular and consistent basis.

Ultimately, the success of a village center depends on achieving four objectives:

1. The village center should represent the “heart” of the community, or at least its neighborhood. This is accomplished by a focus on mixed-use development, creating a place for residents and visitors to live, work, dine and shop.

2. The village center should have an emphasis on ease of use, either through a compact layout or well-developed connections like walkways.
3. The village center must be populated by businesses and services targeted to the local consumer, not out-of-town customers. Doing so allows its businesses to thrive, due to the established customer base provided by local residents, while at the same time providing a source of sustainable tax revenue for the host city or town.

4. Residential development should not be the focus of the development plan. The most successful projects rely on already established neighborhoods and customer base to support new development. While a residential component is often included in the overall development plan, full residential development often occurs after the retail and other commercial uses are established.

7.30 Case Studies

Miami Lakes Town Center

Miami Lakes, Florida (Population 21,727)

An early example of a town center project, Miami Lakes Town Center was constructed and developed in the early 1980s, with its second phase being completed in 1985. Many of the functions common to village and town centers are present in the Miami Lakes Town Center, including specialty retail, entertainment and dining venues and office space. There is also a “main street” theme incorporated into its design. The Miami Lakes Town Center has flourished in the twenty-five years since its completion, with particular success being seen in its collection of apartments, located above retail establishments on the development’s Main Street. The development has also grown since its initial completion, and now incorporates a collection of urban townhouses and a large parcel of multifamily housing units. The town center plays a pivotal role in community life, and serves many of the needs of its surrounding neighborhoods while continuing to operate as a local and regional destination. Although the content of its shops and offices have changed over time, the character of Miami Lakes Town Center has remained consistent, and its focus on mixed-use development and community orientation has made it resilient to the market fluctuations that often plague strip malls and single-use retail developments.

Haile Village Center

Haile Plantation, Gainesville, Florida (2,700 households)

Haile Village Center is located at the geographic center of the Haile Plantation master-planned community. Surrounded by Haile Plantation’s suburban neighborhoods, the Village Center is a traditional neighborhood, with its landscaping, streets, buildings and public spaces tailored and designed to match the character of a traditional village. The development was originally designed to meet the needs of residents living within a mile of its center, but its success and growth have led it to consistently attract visitors from outside Haile Plantation. Haile Village Center is home to a number of single- and multi-family residences, retail shops and professional offices, surrounded by several prominent public spaces. The market’s demographics and location preclude many major retail chains, and the development is populated by locally-owned establishments that serve as “destination establishments,” focusing on drawing their customer base from nearby residents. The development is home to a large number of service businesses and professional offices, providing its owners with a stable mix of tenants.

Southlake Town Square

Southlake, Texas (Population 26,595)

Originally envisioned as an “open-air, mixed-use lifestyle center,” Southlake Town Square was planned to form the downtown heart of the city of Southlake, Texas. Designed and developed with a classic downtown in mind, Southlake Town Square is home to retail shops, office space and several municipal and civic buildings, all housed in a series of large two-story buildings situated on the perimeters of each block. The Square is home to over sixty ground-level shops, restaurants and service-providers.
along with many offices located above. Located in the center of several neighborhoods, an entire block is dedicated to neighborhood retail uses. Southlake Town Square is also home to the town square, a landscaped lot of land that features fountains, benches, a pond and a variety of public gathering spaces. The only major amenity not included in the development is a residential component, due to its location and proximity to several booming suburban neighborhoods. The development has been a resounding success, and is a frequent gathering place for city residents, who see it as a foundation for the future of their city.

Mashpee Commons
Mashpee, Massachusetts (Population 14,227)
Mashpee Commons, once known as the New Seabury Shopping Center, has become one of the premier shopping destinations on Cape Cod. Since its redesign and redevelopment in the mid-1980s, the development has blossomed, transforming into a mixed-use downtown directly descended from the traditional New England town center. Though it initially lacked large plazas and an identifiable center such as a village green or town square, the Commons’ developers worked to recruit a wide range of tenants, including residential, commercial, office-based and municipal services. Today, the Commons are home to a number of civic uses, including a town post office, library and church, along with public safety facilities and a senior housing community and is looking to expand even further.

Mashpee Commons has succeeded and flourished due to the developers’ drive to attract and maintain a wide range of uses, while at the same time maintaining and advancing the New England town center aesthetic. Many of the buildings that make up the Commons have retail or service shops on the ground floor, with housing for singles and young professionals above. The developers are also in the process of adding additional housing in the form of single-family homes and townhouses. By working to capture and nurture a residential population, the Commons are guaranteed a steady pool of customers. Combined with quality retail establishments, Mashpee Commons has become a destination on the Cape, and receives national attention and praise as an example of how a town center based around a main street format can be successfully developed. By focusing on a diverse mix of uses, Mashpee Commons has become a community-oriented town center and a profitable development that will catalyze future growth and expansion.
There was significant support for the notion of an “anchor” to mitigate any developer’s potential risk. In particular, the site would be well-suited for an expansion of medical services and as the home of a training and development center for young entrepreneurs. Such an anchor-type development need not be designed specifically as an incubator, although a developer could design it as such. Its role as an anchor is envisioned more as an opportunity to provide “traffic,” which in turn creates “spinoff” activity and a strong partnership for further development.

Several stakeholders suggested that the town would need to be very aggressive in reducing potential infrastructure costs to developers and limiting their exposure to the permitting and mitigation costs imposed by the Cape Cod Commission or other entities. The town should do all it can to secure grant or other funding to make the site as shovel-ready as possible. The town also should work to pre-permit the site to minimize mitigation costs or, at least, identify potential costs in advance so that there are no unpleasant surprises that could derail development and cost both the town and potential developers precious time.

Most stakeholders expressed support for a strategy that encourages multiple uses at the site and particular support for the civic and recreational aspects of the town’s Local Comprehensive Plan. There was also clear agreement that the need and market for the professional and technical services identified in the report, such as legal, financial planning, medical, and, to a lesser extent, architectural, engineering and high-tech, would grow and allow for the marketing of office space commensurate with the development.

Lastly, it was clearly stated to the team that the town will need to act decisively, if conservatively, in taking steps to prepare and market the site. The town must give the SSVC a clear identity and manage the marketing process with a defined brand and clarity of purpose and vision. It may be in the town’s best interest to turn the development and marketing task over to an EDC (Economic Development Corporation) type entity with the ability to devote time, resources and expertise to the project.
The list of key informants interviewed for this project includes:

- Chris Anderson, Executive Director, Massachusetts High-Tech Council
- David Augostinho, Executive Director, Cape and Islands Workforce Investment Board
- David Begelfer, Executive Director, National Association of Independent Office Properties, Massachusetts
- Ted Brogus, Planner, The Cecil Group
- Louis Cabral, Vice-President for Project Development, Conroy Development Corporation
- Richard Lafrance, Restarateur, Hotelier and President of Lafrance Hospitality Group
- Atty. Michael Leon, Nutter, McLennan and Fish
- James Lydon, MassDevelopment
- Frank Mahady, Principal, FMX Associates
- Michael Metzler, retired CEO, St. Anne’s Hospital
- Wendy Northcross, Executive Director, Cape Cod Chamber of Commerce
- Marie Oliva, Executive Director, Cape Cod Canal Chamber of Commerce
- Leslie Richardson, Economic Development Officer, Cape Cod Commission
- Charles Ritch, Ritch Financial Solutions, Sandwich resident
- Buddy Rocha, Regional Director, Mass. Office of Business Development
- Representative Michael Rodrigues, Massachusetts House of Representatives, Westport
- Attorney Michael Scott, Nutter, McLennan and Fish
- Kristy Senatori, Chief Regulatory Officer, Cape Cod Commission
- Robert Shaker, LEED Green Associate, PACE Project Management
- Thomas J. Sommer, President, Massachusetts Medical Device Industry Council
- Christopher Steele, President, CWS Consulting Group
- David Tibbetts, former Secretary of Economic Development, Commonwealth of Massachusetts
- Thomas Tsakalos, Primary Private Property Owner and Real Estate Manager, SSVC
- Stanley Usovicz, Government Relations, Verizon Communications
- Joel Crowell, President and CEO, Cape Cod Cooperative Bank
9.00 Market Opportunities & Challenges

As noted, the South Sandwich Village Center primarily serves local demand. There are currently only two vacancies in the SSVC, which indicates that local demand is strong enough to support the existing mix of uses in the site. Despite some small commercial developments that are within a 10 to 15 minute drive of the SSVC and the larger Mashpee Commons, about a 15 minute drive from the SSVC, local demand will only grow stronger as the town’s population ages and Sandwich moves toward its estimated final build-out population of 28,759.

In addition, the SSVC is in excellent physical condition, with roadways and sidewalks in good condition and the complete absence of blighted or boarded-up commercial spaces. The proposed transportation infrastructure enhancements (e.g. internal access roads, walkways, and bike paths) and proposed architectural redesign will enhance the SSVC’s marketability further. Thus, competition from other developments should not negatively impact the SSVC’s future development and success. In other words, the SSVC is operating successfully, although not necessarily at its highest and best use.

Any major changes to the SSVC should be made in context of the current market. There are several market drivers and constraints that will impact any development/redevelopment efforts in the SSVC, outlined below.

9.10 Market Drivers
The appeal for new investment is driven by many factors:

- Available land for redevelopment, particularly the 54 acres owned by the Town.
- Specific design elements for the SSVC included in the 2009 Local Comprehensive Plan.
- Future population growth in both Sandwich and the region, particularly among retirees with high disposable incomes.
- Relatively high incomes of Sandwich residents, who are the primary customers of the SSVC.
- Developable/Redevelopable properties are primarily owned by two owners, both of whom have interest in development/redevelopment opportunities.
- Sandwich is a desirable place to live, which is beneficial to any housing component that might be included in the SSVC as well as to businesses wishing to locate on the Cape.
- SSVC is targeted as a Strategic Planning Area in the Local Comprehensive Plan.
- SSVC is perceived as one of the centers of town.
- Successful without tourist traffic - services, stores and businesses are focused on meeting the needs of local and nearby residents, rather than relying on out-of-town business, somewhat reducing the traffic imprint.
- Limited land available that is zoned commercial in Sandwich, thus future competition from other local developments not a major factor.
- Proximity to Otis Air Force Base and the development potential that exists at that location.
- Proximity to Routes 6 and 28, which is appealing to residents, commuters, visitors and consumers
- Significant number of residential properties in close proximity to the SSVC.
- Location of SSVC is close enough to off-Cape regions of Massachusetts to expand its market and utilize a more diverse workforce.
- The Town is already host to the growing medical facilities sector.

9.20 Market Constraints
There are constraints that act to limit development within the SSVC, including:

- Significant public wastewater mitigation costs required by local, regional, and state laws. These costs may be too large to be borne by developers and it will be difficult for the town to pay for these improvements without private sector partnerships. Similarly, expensive internal and external transportation improvements are needed that effectively link the surrounding community.
- Perceptions of complicated local permitting process, which is characteristic of many Cape communities.
- Balancing economic development with quality of life, that is, how much new development are Sandwich residents willing to support and what types?
- Weak identity of the SSVC as a cohesive development.
- Not a destination development, that is, there are not many significant anchors that draw customers from beyond the primary market.
- Traffic issues plague the Cape Cod region as a whole, particularly in the summer months. Due to sporadic bridge construction, this issue sometimes concentrates in the Sandwich area.
- Limited employment within Sandwich, therefore reducing the number of possible out-of-town employees who might frequent the SSVC before, during, or after work.
- Proximity to Mashpee Commons and other local retail/commercial developments limits overall potential retail development.
- Near-term residential growth may be slow due to high property and housing costs and possible rezoning.
- Poor visibility of the development from adjacent...
roadways. For example, the state-owned land blocks the view from Route 130 (and offers no access from the west) and the opposite side of the development is hidden from the roadway by trees and foliage. While the town may covet setbacks and design that hides the SSVC and makes the area more attractive, it does not provide easy sight lines for potential customers who are not familiar with the SSVC.

- Future development of the Massachusetts Military Reservation might attract visitor trips currently made to the SSVC.
- Local workforce issues within the context of the larger Cape-wide “brain drain” of young, educated talent.
- Current lack of a dedicated economic development entity to handle development for the town.
- SSVC location away from the highway and its limited retail constrains its use for tourism and hospitality activities.
- Current lack of high capacity/fiber optic service for data transmission and storage.

Taking into account these market opportunities and constraints along with the demographic and economic base analysis of Sandwich and surrounding markets, the consultants have identified the strengths and weaknesses of various types of development opportunities for the SSVC.

9.30 Development Recommendations

Retail

The literature review shows that a major retail base capable of acting as a catalyst for additional development is a factor in most all successful redevelopment efforts; retail uses drive residential and office uses. However, while population growth and high incomes provide promising future opportunities for the SSVC in the retail sector, the economic downturn and rising housing prices over the past few years have stemmed population growth considerably. In addition, the area that immediately surrounds the SSVC primarily consists of single family homes with very few unoccupied properties. This relatively stable residential condition with limited opportunities for immediate growth limits opportunities to significantly expand the retail selections of the SSVC, though the market should bear small-scale retail development. Interviews with residents and current SSVC business owners indicate that Sandwich residents often have to drive out of town to purchase simple items such as shoes and clothing. While transportation improvements such as bike and walking paths may be effective in attracting more local residents and “pass-through” customers from outside Sandwich, it is uncertain if these improvements can attract the number of local residents necessary to warrant a significant increase in retail development.

Both the survey of businesses on-site at the SSVC and key informant interviews of business owners in the SSVC indicate strong support for an expansion of retail activity at the site. Clearly, there is a recognition and belief among those currently in the SSVC that their success would be enhanced with the addition of substantially greater “foot traffic” in and around their businesses. For some, this embrace of an increase in retail activity would extend to big box retail, something that would be inconsistent with the town’s comprehensive plan and a decision that the research team would not recommend as the best way to spur new development within the SSVC. Embracing and attracting big box retail would not be consistent with current market conditions and may hamper efforts to pursue other alternatives that could produce a noticeable increase in potential customers.

It is tempting to create a destination-style retail sector in the SSVC, which might include signature restaurants, entertainment venues, and big box stores that are intended to capture a greater share of leakage to retail and office opportunities outside the region (i.e. Sandwich residents shopping out of town). Additionally, most large retailers are unwilling to locate in a development such as the SSVC, since it lacks clear visibility and easy access from major roadways.

Another consideration is the fluidity of market demand as new retail options are constructed both inside and outside the primary market area. For example, Sandwich is developing a small retail section about a mile from the SSVC, which will compete with the SSVC for customers. The Town of Mashpee is also moving toward expanding the commercial areas surrounding the Mashpee Commons, the Massachusetts Military Reservation may be redeveloped, and other communities are looking to expand their commercial sectors.

In the view of several key informants interviewed, the Cape is already “over-retailed.” And yet, an expansion of retail activity within the SSVC will likely be necessary to support the short- and long-term development costs inherent to this particular site. It was suggested that the level of retail activity would need to be large enough to draw from an expanded local market that could include new visitors, residents and workers in a fully developed SSVC that might also serve a secondary market in a way that some other retail centers in the Cape Cod region do not, catering primarily to an expanded local market rather than attempting to attract casual or tourist-level shoppers from longer distances. Some stakeholders felt that utilizing retail as the lead attraction to future development may not
succeed, and that development efforts would meet with a greater likelihood of success if development instead utilizes an “anchor” strategy as the foundation of future growth.

In sum, it is important to understand that the SSVC will continue to draw the majority of its customers from Sandwich and that historically, village centers that focus on drawing a significant number of customers from outside the primary market are rarely successful in these efforts. This is echoed in the Local Comprehensive Plan, which envisions the build-out goal of the SSVC as “retail stores that focus on the surrounding neighborhoods as the primary market such as the grocery store, restaurants, hardware and lumber.”

It is likely that a retail expansion that is consistent with the town’s stated intention of catering to local needs can help to accomplish the overall development goals by servicing a local area extending beyond the town limits, without resorting to big box retail or having to compete with other commercial centers. Such retail expansion, however, will have to be part of a larger strategy for site development that creates a synergistic mix of activities and uses consistent with sound planning and smart growth principles.

**Professional, Medical, and Technical Services - Opportunities and Challenges**

The Sandwich Local Comprehensive Plan notes that the town holds the potential for additional growth in “high quality office space focusing on financial, legal, health care services and possibly education facilities such as a corporate training center.” As the town’s median age increases and more retirees are settling in Sandwich and its surrounding communities, the need for financial, legal and medical services will expand. However, a constraint to growth in those industries in Sandwich is the limited availability of quality office space.

The SSVC currently hosts a number of successful businesses in the medical and finance sectors. Any further development or redevelopment in the SSVC should include additional professional and medical office space, perhaps even as a stand-alone building or office complex. Interviews with key informants made it very clear that the growth of the medical services sector provides significant opportunities for development in the SSVC. This opportunity exists not only in the filling of newly-constructed office space that could be part of a new development, but also as a potential anchor in the form of a hospital outpatient clinic, in-patient or outpatient rehab facility, or a medical testing laboratory. According to some specialists in this area, there is a market in the upper Cape area for these services. In fact, there appears to have been an increase in single building and converted residential offices in the area and along Rt. 130.

It was also reported that Cape Cod Hospital (CCH) sometimes suffers from traffic issues of its own as Cape Cod residents attempt to travel there during the summer months. While CCH currently serves as the focal point of primary and emergency care services on the Cape, a Sandwich location focused on out-patient medical procedures may offer convenience to some Cape residents and support other businesses in the SSVC by bringing additional visitors to the site.

Several key informants noted that major hospitals often have satellite centers with a combination of outpatient, rehabilitation and testing services or various combinations of outpatient clinics with medical office space. It is conceivable that the proper density of existing medical services combined with a competitive cost, would make the SSVC an attractive place for such a development, especially given that it is accessible and within range of a significant residential population.

More importantly, attracting more professional office development to the SSVC will provide employment opportunities to town residents, while employees who live out of town will increase demand by patronizing SSVC businesses before, during and after work. For example, the survey of current SSVC businesses estimates that 15 percent of their customers are currently employed in the SSVC.

While the medical services sector has the potential to employ people in larger volumes, the other sectors in this category tend to lend themselves to an area that is also a characteristic of Cape Cod employment: proprietorship. Our key informants almost uniformly agreed on the need for continued growth in the areas of financial planning, legal services and accounting. They also agreed that the workforce of the community and the region supported these growth businesses as small, entrepreneur-type entities. There is a significant percentage of Sandwich residents working off Cape Cod, many in the professional services and medical fields. As they transition into the latter part of their careers, many in the professional services sector seek to work closer to home. While these sectors would have a difficult time meeting employee needs for high volume companies, it would appear they would have no trouble meeting the local and regional demand through the effort of smaller enterprises that, taken in total, could help drive the market for office space in the SSVC.

**High-Technology/Light-Clean Industry - Opportunities and Challenges**

The Sandwich Local Comprehensive Plan envisions high-technology or light-clean/industrial and business uses in the SSVC such as environmental, communications, biotechnology and back office operations. This vision is in
concert with Cape Cod’s Economic Development Strategy that seeks to attract and expand light-clean industries. These industries generally pay high wages while having smaller environmental impacts in comparison to traditional manufacturing firms. However, partly due to the Cape’s geographic isolation and partly because there is no major university in the region, it has been difficult to develop the high technology cluster so common in other parts of the Commonwealth. While the region is home to a small number of high-tech businesses, along with the facilities located at the Massachusetts Military Reservation and Woods Hole and a potential partner in Cape Cod Community College, the network of research, technology transfer, infrastructure and business start-ups that would promote the emergence of a high technology cluster is lacking (Barrow, 2001).

Information gathered by the research team, however, suggests that high-technology companies of a smaller scale, the likes of which could fit into a larger vision for the SSVC, should not be discounted. The Massachusetts High Technology Council ranks the Town of Sandwich in the upper 20 percent of communities in Massachusetts in terms of its attractiveness to high-tech companies, factored using a range of location criteria. Sandwich was identified as being favorable to high-tech businesses due largely to its commercial tax rate and its educational attainment levels, and scored three out of five stars on the council’s overall ratings system (see Appendix C).

While this is good news relative to the town’s efforts to support an industry sector that has been identified as clean, paying higher wages and being compatible with other uses, it does not necessarily address issues of size and the ability to provide a ready workforce for this industry. It would appear that the best approach for the Town in light of this information is to pursue a strategy that keeps open the possibility of a partnership with an entity that can offer training and support for entrepreneurs and high-tech startups as part of any overall development plans for the site.

The Cape and Islands region has seen major layoffs in the past several years at its large technology employers, such as Infinium Software, Taque Systems and Lucent Technologies, mirroring state and national trends. Nonetheless, the Cape’s attractive quality of life and high levels of educational attainment support a business climate that can nurture the emergence of firms occupying specialized niches in marine research and intellectual property development, including software, switching technology and web development. These enterprises have the capacity to generate significant amounts of regional export revenue by attracting research grants, licensing and royalty revenue and consulting fees as opposed to “sales” in the traditional sense. Since many of these firms are small corporations, they avoid many of the land use and population pressures created by large manufacturing facilities.

One potential challenge to this strategy is that many of the area’s brightest students leave the area to attend colleges and universities off-Cape. These individuals are less likely to return to the area if there are no jobs available that match their skills, affordable housing in which they can live, or reasonably priced office-space they can rent. The result is that the region loses the type of potential hi-tech entrepreneurs who fuel the expansion of the knowledge-intensive sector. The challenge for the Cape in general and Sandwich in particular is to find ways not only to sustain a high level of educational performance, but to also provide avenues for educated residents to apply their knowledge and skills in the local area in ways that seed further business growth in these industries.

Another impediment to the development of many high-technology industries is the lack of a fully developed broadband infrastructure. The non-profit OpenCape Corporation, which is addressing the need for a regional communications system to enhance education, research, and economic development, notes that the Cape and Islands region has seen limited investment in broadband infrastructure largely because the population density is insufficient to deliver a return on investment. The result is “a lack of competition that in turn results in a lack of availability of broadband in low density areas, inadequate capacity, and a high cost of service for consumers and anchor institutions.”

The OpenCape Corporation is hopeful that recent grant awards will change this dynamic. Given the Cape’s geographic isolation, expansion of broadband services could play a major role in future development plans. However, it is important to note that once the initial phase of broadband expansion is completed, there will be a temporary imbalance in the implementation of “last mile” expansion to specific sites. Sandwich should identify the SSVC as a preferred site for broadband services as early as possible in the process to ensure quick access to the developing broadband network.

Many specialists and generalists interviewed cited the lack of broadband capacity as a significant obstacle for certain types of development. “High-tech” sectors such as software development and even non-technology sectors are increasingly relying on broadband capacity to provide product development, marketing, purchasing and ordering functions. Once thought to be a major reason why the Cape would overcome the challenge of its geographic isolation, the continued lack of broadband infrastructure has become a major impediment to attracting development.
Larger light-clean/high technology industries might be better suited to the Sandwich Industrial Park, where there is an estimated total of 488,000 square feet of commercial and industrial space. According to estimates by the Sandwich LCP, approximately 20 percent of this space is vacant. The Industrial Park might also provide space where entrepreneurial companies that begin their life in the SSVC can transfer to larger facilities when the time for expansion comes.

Key informant interviews confirmed that one of the town’s strengths is the ability to offer a variety of development/business options in different locations around the community. In particular, the ability to create, over time, a vibrant village center with multiple uses serving the town’s residents, employing people and expanding the town’s tax base is seen as a real asset. Additionally, the adjacent industrial park area and the historic center of the town give the town the ability to focus different types of development and businesses within its borders and within a defined focus that does not foster competition between different locations, all while diversifying interests and enhancing a broad array of activities that allows the town to preserve a strong quality of life.

In addition to the challenges that exist due to the lack of broadband and the challenge of assimilating light industrial activities into the village center, the sectors of medical device manufacturing, biotechnology, and, to a lesser extent, marine technology and environmental technology businesses face difficulties in this location due to the difficulty of transporting any product that might be manufactured on-site. Many respondents cited the geographic location of the SSVC and the Cape in general as limiting their access to a sufficient workforce but, additionally, limiting their transportation options for moving any product or importing any material needed for their production. Whether the problem is real or perceived, many key informants cited the challenge of “crossing” the bridges and battling summertime traffic as a reason why many businesses automatically discount consideration of a Cape business location. Others extended their apprehension to travel on Route 6 and the limited roadway access between Rt. 6 and the SSVC. The results of the business survey conducted for this report show that highway access is the most important criterion a business would evaluate in selecting a new site.

Rail investment could assist in making this perceived detriment less of an issue for future business development, both in terms of reducing traffic in and around the Cape and offering another option for moving materials and manufactured goods. However, given the current pace of the Commonwealth’s rail improvements, the competitive tension between passenger and freight service and the lack of existing rail line directly to the SSVC site, it is not recommended that rail investment should be counted on, at this time, to mitigate the transportation concerns cited in this report.

The communications business sector, while not as directly affected by some of the transportation challenges, is also an unlikely candidate for development within the SSVC given those factors that currently drive their location decisions. Feedback received by the research team indicate that because communications and utility firms have great flexibility in where they locate, and because they rely significantly on broadband width, they tend to locate their offices in larger metropolitan areas or, to a lesser extent, in proximity to other high-tech clusters. Back office operations are typically not far from their other operations for the purpose of supervision and training.

**Hospitality & Tourism**

While the Local Comprehensive Plan does not specifically call for consideration of a significant hospitality/tourism component, the team endeavored to measure the willingness of such entities to consider the SSVC and the ability of this site to attract such businesses.

Key informant interviews verified some of the difficulties that can be assumed in attracting hotel/high-end restaurants to the SSVC. Informants conveyed that hospitality entities are not likely to foresee sufficient retail activity at the SSVC, even with its development potential, to consider it a suitable location. When combined with its lack of proximity to Rt. 6 and, therefore, the lack of visibility to a high traffic area, as well as the potential limitations to construction and design such as building height restrictions, the hospitality industry is not likely to be part of a future redevelopment at this site.

It was indicated, however, that a partnership with a major, credible entity such as a medical, university, conference center, or training center facility could change that dynamic. It was explained that partnerships in hospitality development help to mitigate the risks inherent in such development. Such a facility, or a combination of facilities, would not need to be overwhelming in terms of size but sufficient to warrant an initial investment that could be recouped over time.

Access to reliable water and sewer infrastructure is of paramount importance in supporting this sector, as are having complete knowledge of the costs of such investment and services in advance. Impact and permitting fees must also be clearly identified before development takes place, as hotels and hospitality entities can only earn a specific amount of revenue based on capacity and demand and will fail if their operational costs shift after occupancy.
As for higher end food services/restaurants, the SSVC will need to have higher-end retail to support this type of development. While office space can create some demand for food markets, the higher end, sit-down, table cloth restaurants, whether they be high-end chain restaurants or independents, are dependent either on specific history, reputation or location, or as a spin-off to significant mixed-use activity such as is created by a strong retail sector.

**Arts & Creative Sector**
The Local Comprehensive Plan references the possibility of including, within its multiple proposed uses, an arts sector. While the definition of the “creative economy” has expanded over time to mean a variety of things, it is generally accepted that such businesses are usually reflected in proprietorships and small retail or production shops.

While a number of key informants interviewed did not discount the development of an arts-related sector in the SSVC, it was not believed that a focus on such activities would provide a sufficient foundation on which to build a development strategy. Where such enterprises have been successful, it has occurred in small, concentrated areas. Even housing developments geared to artists and artist workspaces have relied on development funded by other means. The infrastructure needs of the SSVC will require revenue generation in excess of what this business sector can provide on its own.

Under an expanded definition of the “creative economy,” it is very possible, given a redevelopment plan for the SSVC that is driven by an anchor tenant or a major employer of another type, that there could be support for the presence of some creative sector businesses within the overall development as ancillary to and supportive of the mixed-use approach. Businesses representing the fields of advertising, architecture, multi-media strategies and design could all utilize space in such a redevelopment and, while not the entities that would drive the redevelopment, could play an important role in creating a diverse and vibrant economic center.

**9.40 Development Design & Strategies**

**Office Space**
As already identified in previous sections of this report, and consistent with the vision proposed in the Local Comprehensive Plan, there is sufficient reason to recommend pursuit of office space development at the SSVC as an integral part of its future build-out. The business survey’s collection of opinions, which site quality of life as a significant factor in location decisions, and the ability of the Town to create a village center with the capacity to host a variety of activities that can serve the town and the larger region, could make the SSVC location very attractive to a number of prospective small businesses and professionals.

As reflected in the key informant interviews, the research conducted on growth sectors and expected market demand, there will be opportunities to lease, rent and sell office space for the professional and technical services that the local market will consume. Other factors in the development strategy could lead to the need for office space for small business start-ups serving a new generation of entrepreneurs, ancillary medical office space and high-tech incubators.

The success of office space development at this site will probably be tied to two major factors: the cost of site development (which, in turn, will dictate the price per square foot that will need to be charged to occupants of the space) and a supporting major partner/anchor that can spin off activity and/or incubate a steady supply of prospective occupants for available space.

Office space will also serve as a driver for other base activities at the site, including the retail/services sector. Therefore, expanded and well-developed office space should play a vital role in the overall development of the SSVC.

**Civic & Recreation Facilities**
The development focus of many village center projects is to create a vibrant community town center with a sense of “place,” making it a destination that draws visitors from nearby neighborhoods. A key strategy in achieving this goal is incorporating civic uses such as a town hall, public safety complex and library into the village center’s development plan. An increase in civic activities will improve the identity of the SSVC, promote it as a destination instead of simply a collection of stores and offices and draw additional visitors to the area. A key build-out goal for the SSVC is the incorporation of civic uses such as town facilities, services and passive and active open spaces, including new public facilities. The inclusion of a new municipal campus should be considered at the southeast corner of the SSVC, at the intersection of Quaker Meetinghouse and Cotuit Road, as suggested in the Sandwich LCP.

Several key informants emphasized the importance of the proposed civic and recreational uses to the overall village center concept. It was often cited as an amenity that would be quite attractive to the types of development that the town might pursue. The town will need to decide which of its municipal functions it may want to locate at the SSVC, including the possibility of a Town Green, library, or community center. The location of functional town offices need not mean a complete relocation of Town Hall from its
available state and federal incentives for affordable family housing, such a development would have to take into account the aforementioned impact on municipal services, as well as its impact on the overall vision created for the SSVC.

One item that was suggested for consideration by those interviewed was the concept of providing workforce housing for Sandwich residents and employees. The growth in the number of municipal employees (primarily through growth in the school department in the last several years) and growing acceptance in the concept of workforce housing, which has attracted interest and potential funding sources, may provide the nexus for the town to work with a potential development partner on defining and clarifying this concept.

Anchor Tenants
Several of the key informants and the research team's exploration of local markets indicate that retail and office space, or a combination of the two, may not be sufficient to support the level of site development and infrastructure costs required to accomplish the village center vision. While access to significant grant funding may alter that perception, long-range planning requires a clear-eyed approach to the challenges that will be faced in developing the site.

As such, the team sought to identify ways in which the town could reach a bit beyond the purest form of village center development without significantly altering the concept. In doing so, the research team kept in mind the overall goals of the town, the local markets and the planning processes of the town and the Cape Cod region.

While it is recognized that the following recommendations suggest the SSVC host facilities that qualify for tax-exempt status, the research team believes that a willingness to possibly forego tax revenues on a portion of the property may lead to a greater chance that overall redevelopment will occur while, at the same time, offer a concentration of employment opportunities that benefit town residents and a level of activity to support other businesses in the SSVC and Sandwich in general.

Medical/Rehabilitation Facility
As previously stated in this report, there is strong evidence to suggest future growth in the medical services sector, and Sandwich is well positioned to meet both a local and sub-regional need. The SSVC is already home to several medical services and small rehabilitation facilities and Sandwich already hosts a significant in-patient rehabilitation facility.

Several key informants suggested that the town engage in discussions with entities such as Cape Cod Hospital or one
There are other reasons why this particular recommendation brings benefits to the local community and the region. The previously-identified “brain drain” that has been occurring on Cape Cod calls for a strategy that retains young people in sufficient numbers to help change the economies of the region in a positive way. Such a facility could be seen as the place where the region spawns its next generation of business and entrepreneurial leadership.

Such a facility also lends itself well to the sectors of the Cape Cod economy focused on proprietorship-driven activity. Also, given the relatively good marks assigned to the town by the high-tech industry, and in concert with the availability of office space within the SSVC, the Center could be a place of significant spin-off for high-tech start-ups, along the lines envisioned by the Local Comprehensive Planning Process.

Lastly, given the educational attainment levels of Sandwich residents, and the proximity to retirement age of a significant number of residents in professional positions who currently commute to work off the Cape, there is real potential for local involvement in such a training facility. Additionally, there exists the potential for Sandwich residents to utilize their off-Cape connections to create a gateway for activity to take place in the Cape region previously consigned to off-Cape locations. It is the research team’s belief that there is a window of opportunity, given the Cape-wide need and the unique attributes of the Sandwich community, to create a facility that can help anchor other types of development that allow the town to complete its development vision.

Discussion with potential partners in this endeavor, such as Cape Cod Community College, the Cape Cod Workforce Investment Board, the area Chambers of Commerce and possibly even the University of Massachusetts at Dartmouth, which currently offers similar programming through its PCE division and could potentially include its own Charlton College of Business in the development of the program, should begin early to allow this concept to integrated into potential development discussions and the marketing of the site to potential developers. The inclusion of a focus on entrepreneur development in the Cape-wide planning process also affords the opportunity for outside funding to facilitate such a facility, making the effort to pursue this proposal all the more timely.
10.00 Conclusions

Any development and/or redevelopment effort in the South Sandwich Village Center will first have to address the significant wastewater, stormwater and transportation mitigation costs. The SSVC is currently served by closed tank septic systems governed under the laws of Title V. While the nearby Forestdale School has additional capacity to treat wastewater generated by new development in the SSVC, the capacity is limited and is unlikely to be sufficient to handle wastewater from a significant level of development in the SSVC without costly expansion.

There is no easy or inexpensive solution to the wastewater issue, and it is unlikely that a private developer would willingly bear the costs for these improvements. In addition, the Town may not have the financial resources or will to support the construction of such infrastructure. For example, the Cape Cod Commission-imposed transportation mitigation costs for the 2005 private development proposal were approximately $4,000,000. This does not address wastewater and stormwater mitigation costs, which are likely to be much higher than that amount.

The SSVC will certainly be more marketable if these issues are resolved before any new development is considered, meaning that the best strategy might be for small-scale commercial development that limits mitigation costs while the larger mitigation issues are addressed, perhaps using federal funds. The Town's 2009 TIGER grant application is one step toward addressing the transportation issues.

In addition, if the South Sandwich Village Center is to be pedestrian, biker, and automobile friendly, while creating an architecturally pleasing design that fits in to the historical character of the town, then significant commercial development may be contrary to that vision. The success of the village center developments that were reviewed for this report hinge on the public uses, open space and local retail demand and usually do not include large commercial uses.

While the research team believes that the town has correctly settled on the village center approach, and that such an approach fits well within the town's history and culture and gives the town a unique opportunity in comparison with other Cape Cod and New England communities, analysis of markets suggests that the town will have to expand beyond the usual approach taken in the development of such centers and that creating a retail and service sector that reaches beyond the borders of the town is vital. It is believed this will validate the significant planning and preparation that has already been accomplished by the town.

There will need to be heavy doses of both persistence and patience in the development of this site, and the town will need to work with a developer who is opportunistic and flexible in seeking to take advantage of rapidly changing conditions and circumstances. Any plans to significantly develop the SSVC will need to be planned over a long term, as the infrastructure challenges are significant and may dictate a slower pace of development than first envisioned. Many of the successful development projects reviewed by the consultants included strong public/private partnerships.

It is the opinion of the team, however, that with the right development partners and a well-identified anchor, the town's strengths and the excellent quality of life that makes it an attractive place to live and work will prevail in creating what could be a model development for communities of this type across the nation.

10.10 Recommendations & Action Steps

1. In planning for future development, the Town should focus efforts on introducing a more diversified retail marketplace that meets local consumer demands for particular products or services they must go elsewhere to obtain. Doing so will also ensure that the SSVC has additional revenue-generating establishments that can help to support development efforts in the SSVC.

2. Given the Town's Local Comprehensive Plan, development at the SSVC should reflect the ultimate vision for the site as a village center with the goal of providing services that serve both local consumers and the wider regional market.

3. The Town should work closely with the Cape Cod Commission to identify all possible permitting and development mitigation issues germane to the SSVC to ensure a site that is ready for more rapid development, affords developers a clear understanding of what to expect, and establishes the SSVC, as much as possible, as a pre-permitted site. In engaging in this effort, the Town should explore all possible options that might facilitate greater ease in navigating the permitting and development process, including the possibility of expedited permitting procedures.

4. Given the nature of current state and national economic challenges, the Town will have to approach the development of the SSVC with a long-term view that identifies immediate, intermediate, and more distant development objectives that will ensure a gradual pace for achieving the Town's goal of realizing the “highest and best use” for the SSVC.

5. The Town should consider the establishment of an Economic Development Council and transfer responsibility for the development of the SSVC to this entity.
Recommendations & Action Steps

6. In addition to retail, the Town should pursue the creation of office space for financial planning firms, legal services, architectural firms and possibly small-scale hightech start-up companies for which there will be demand.

7. To complement further commercial development in the SSVC, the Town should also consider the preservation of sufficient space to accommodate for civic uses that provide green space, which supports the vision for the SSVC as a true village/town center.

8. The development of the office and retail sectors within the SSVC will only happen with the support and inclusion of a credible partner that can serve as an anchor to the entire site. Doing so will minimize the perceived risk that some developers might have relative to investment in the SSVC. Given the demographic changes that the town will experience and the trends in employment on the Cape, credible partners can include those who provide medical, rehabilitation, or outpatient services or those who develop office space for medical services, as well as a university that might develop space for a college-sponsored entrepreneurial training program or new business incubation.

9. Given the existence of various centers for economic, commercial and industrial activities in the town, officials should consider the compartmentalization of the Historic Downtown District and Industrial Park for specific uses that set them apart from the SSVC and will allow the SSVC to develop a distinct identity.

10. The town should seriously consider the allocation of resources for the development of a comprehensive marketing plan for the SSVC that can attract prospective developers and businesses and raises an awareness of the particular identity that the Town wishes to portray for the SSVC’s development.

11. To ensure the continued viability of existing businesses and those that might locate in the SSVC in the future, as well as to attract new development opportunities, the Town should implement measures that will afford the SSVC greater visibility from Cotuit Road, Quaker Meetinghouse Road, and particularly at the SSVC’s northern boundary where Route 130 and Cotuit Road intersect.

12. To foster development, the Town will need to begin concerted and collaborative efforts to resolve on-site and off-site traffic concerns, wastewater issues and the lack of access to broadband capacity. The level of density sought cannot be supported without a solution to wastewater removal. In addition, the Town may consider working with prospective developers to share transportation/traffic mitigation costs that might otherwise deter projects from moving forward. In attempting to alleviate these issues, the Town may have to consider bonding, explore possible grants such as MORE grants offered through the state’s Executive Office of Housing and Economic Development and/or the implementation of a District Improvement Financing (DIF) project.

13. Housing, particularly workforce housing, can be a part of the SSVC’s future development, but given the current conditions in the housing market, the Town may not be able to realize the creation of additional units for another 10 to 15 years.

14. In working with opportunistic developers, the Town should endeavor to provide sufficient flexibility to meet the needs of these firms as a way to establish long-term development partnerships that can strengthen the SSVC.

15. To achieve the redevelopment of the SSVC for its “highest and best use,” the Town should consider the possibility of incentivizing upgrades to private properties within the SSVC that incorporate the design desired by the community’s vision for the site as a village center. Incentives could include the use of statutory tools at the town’s disposal, such as Tax Increment Financing, or strategies employed by an EDC such as grants for uniform and upgraded storefront improvements or loans for infrastructure upgrades. Such incentives can be used to leverage private sector commitments for the upgrade of facilities and infrastructure on private property.

16. The existence of state preservation lands in the western portion of the SSVC can present itself as a potential challenge or opportunity. Given the proximity of the Town’s developable land to this protected area, Town officials should work with their counterparts at the state level to adequately ensure that this proximity will not pose a potential barrier to future development efforts and for particular uses that the Town might seek to introduce in that area. Town officials should seek to include State Economic Development Officials in these discussions to ensure that the Commonwealth’s Department of Conservation and Recreation and other environmental officials recognize the development of the SSVC as a “smart growth” strategy that can be accomplished without degrading protected resources. As an opportunity, this state land could provide support to the development of housing units on the Town’s land should the state allow for passive recreational activities such as walking/nature trails.
Sources


Town of Sandwich. 2009. Local Comprehensive Plan. Town of Sandwich, MA.

Town of Sandwich (with assistance from Horsley Witten Group, Inc.). 2009. South Sandwich Village Center TIGER Grant Application. Town of Sandwich, MA.

Town of Sandwich. 2010. Town of Sandwich Housing Production Plan. Town of Sandwich, MA.


Appendix A

Business Survey Instrument
Thanks for taking the time to participate! The results will assist the Town in planning the future of the South Sandwich Village Center, while also providing valuable data to your organization. All results are confidential and will be reported in aggregate only.

Q1. How likely is your company to relocate or open a new location in the next 3 years?
   - Very Likely
   - Somewhat Likely
   - Somewhat Not Likely
   - Not Likely
   - Don’t Know

Q2. How many people do you employ?
   - <5
   - 11 to 25
   - 25 to 50
   - 50 to 100
   - >100

Q3. Which of the following industry categories best describes your business?
   - Back Office
   - Education
   - Finance, Insurance, and Real Estate
   - Food & Beverage
   - Government (not including education)
   - Lodging
   - Mail Order/Internet Sales
   - Manufacturing
   - Public Utility
   - Retail
   - Tourism/Recreational Services
   - Transportation
   - Wholesale trade
   - Other

Q4. Whether or not you plan to relocate or expand, we are interested in determining the site selection criteria that are most important to businesses. If you were to relocate, what would you say are the 3 to 5 most important criteria you would evaluate in selecting a new site and/or building?
Q5. Whether or not you plan to relocate or expand, how important would each of the following factors be in selecting a new location? Please respond on a scale of 1 to 5, with 1 meaning not important and 5 meaning critically important.

<table>
<thead>
<tr>
<th>Factor</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>N/A</th>
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<tbody>
<tr>
<td>Access for large vehicles</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>College educated workforce</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Ease of permitting and regulatory procedures</td>
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<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Existence of sewer infrastructure</td>
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<td>O</td>
<td>O</td>
<td>O</td>
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<td>O</td>
</tr>
<tr>
<td>Existence of water infrastructure</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Low local commercial/industrial tax rate</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
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<tr>
<td>Local tax incentives</td>
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<td>O</td>
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</tr>
<tr>
<td>State tax incentives</td>
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<td>O</td>
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<td>O</td>
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<tr>
<td>Proximity to a 4-yr college/university</td>
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<td>O</td>
<td>O</td>
<td>O</td>
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<td>O</td>
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<tr>
<td>Proximity to a 4-lane highway</td>
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<td>O</td>
<td>O</td>
<td>O</td>
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<td>O</td>
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<tr>
<td>Proximity to a major airport</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Proximity to commuter rail</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Proximity to similar businesses</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Proximity to freight rail</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Quality of life of the community</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Well developed Broadband infrastructure</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Proximity to a major city</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

Other factor(s)?

Q6. What mode(s) of transportation are used most frequently to bring inputs to your company and ship finished products to your customers? (Please check all that apply)

- [ ] Air
- [ ] Truck
- [ ] Railroad
- [ ] Ship/Sea
- [ ] Automobile
- [ ] Other

Q7. Do you sell primarily to consumers or businesses?

- [ ] Consumers
- [ ] Businesses
- [ ] Both
- [ ] Neither
- [ ] Other
Q8. What is your company's target market?

Q9. Is it important for your business to be near your target market?
   - Yes
   - No
   - Not Sure

Site-Specific Questions

The town of Sandwich, Massachusetts is located on Cape Cod and has a population of approximately 23,000. The 298 acre South Sandwich Village Center (SSVC) is located approximately 6 miles from the Cape Cod Canal and 2 miles from Route 6 (a four-lane highway) at the intersection of three main traffic routes: Route 130, Cotuit Road, and Quaker Meetinghouse Road. The SSVC serves as the central marketplace for the town’s residents, a majority of which live within a mile of the SSVC. It contains a movie theater, the Heritage Park Shopping Center, Stop & Shop, and a variety of small-scale retail and dining venues, as well as a small elderly housing community and a Pop Warner Football Facility. In addition, the town receives freight rail service, although not directly at the site.

Q10. If you are planning to relocate and/or expand, would you consider locating in the South Sandwich Village Center?
   - Yes [Please skip to Q11]
   - No [Please skip to Q13]
   - Not planning to relocate or expand [Please skip to Q14]

Q11. What makes this site attractive to you and your business?

Q12. If you were to relocate or expand, how much space would you need?
   - For land? (in acres) ___________________________________________________________________
   - Building? (square feet) ___________________________________________________________________

   [Please skip to Q16]
Q13. Why would you not locate your business at this site? [Please skip to Q15]

Q14. Would you consider locating in the South Sandwich Village Center if there was ever a future need to relocate and/or expand? [Please skip to Q16]
   ○ Yes
   ○ No
   ○ Not Sure

Q15. Would you consider locating in the South Sandwich Village Center in the future if the site was redeveloped or developed differently than it currently is?
   ○ Yes
   ○ No
   ○ Not Sure

Q16. Any additional comments?
Appendix B

South Sandwich Village Center Business Survey
The Town of Sandwich has retained the UMass Dartmouth Center for Policy Analysis and Urban Initiative to develop a market analysis of the South Sandwich Village Center (SSVC). The goal of the project is to determine the types of businesses and industries that are the highest and best use for the SSVC.

We would like to know your opinions and ideas about the future development of the SSVC. This survey will take only a couple of minutes to complete and the results will be confidential and reported in aggregate only.

You can complete the survey online at: [http://ssvcbusiness.questionpro.com](http://ssvcbusiness.questionpro.com) OR you can fill out the survey below and return it at no cost using the business reply envelope provided.

1. How many people do you employ?
   - <5
   - 6 to 10
   - 11 to 25
   - 25 to 50
   - 50 to 100
   - >100

2. Which of the following industry categories best describes your business?
   - Business Services
   - Personal Services (e.g. barbershop, hairstylist, nails, tanning)
   - Finance, Insurance, and Real Estate
   - Food & Beverage
   - Medical
   - Retail
   - Tourism/Recreational Services
   - Other (please describe) ________________________________

3. Approximately what percentage of your customers would you say come from each of the sources below?
   - % Sandwich Residents
   - % Cape Cod residents (not including Sandwich residents)
   - % Off-Cape residents
   - % Tourists/Seasonal residents
   - % Other (please describe) ________________________________

4. Approximately what percentage of your customers work in the SSVC or the nearby Sandwich Industrial Park?
   - % customers who work in SSVC or Industrial Park
6. What type(s) of new development in the SSVC would be beneficial to your business? For example, professional offices, medical offices, public uses such as a public safety facility or library, more open space, etc.?

7. What do you think are some of the major challenges in attracting new development to the SSVC?

8. Any additional comments?

Thank you for your time!
Appendix C

Massachusetts High Tech Council
Community Scorecard
**Sandwich, Massachusetts**

**Rating:** ★ ★ ★ ★

<table>
<thead>
<tr>
<th>Category</th>
<th>Data</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>MassTrack Rank (1-351)</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>One of 242 Communities with a Single Tax Rate</td>
<td>YES</td>
<td>N/A</td>
</tr>
<tr>
<td>One of 109 Communities with a Split Tax Rate</td>
<td>NO</td>
<td>N/A</td>
</tr>
<tr>
<td>Commercial Property Tax Rate Differential</td>
<td>0.0%</td>
<td>3</td>
</tr>
<tr>
<td>Commercial Property Tax Rate per $1000</td>
<td>$9.61</td>
<td>70</td>
</tr>
<tr>
<td>Have Tax Increment Financing Program</td>
<td>YES</td>
<td>N/A</td>
</tr>
<tr>
<td>Percent 10th Grade Students who are Advanced/Proficient in 2008 Math MCAS</td>
<td>87.5%</td>
<td>67</td>
</tr>
<tr>
<td>Change in Percent Advanced/Proficient in 10th Grade Math MCAS, 2007-2008</td>
<td>2.4%</td>
<td>171</td>
</tr>
<tr>
<td>College Graduates Within 30 Minute Drive Time</td>
<td>50,430</td>
<td>241</td>
</tr>
<tr>
<td>Percentage of Workforce in Technology</td>
<td>4.4%</td>
<td>257</td>
</tr>
<tr>
<td>Number of MEPA Projects from 2004-2007</td>
<td>9</td>
<td>17</td>
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<tr>
<td>Average Annual Percent Change in Commercial/Industrial New Growth, 2004-2007</td>
<td>3.4%</td>
<td>140</td>
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<tr>
<td>Expedited Permitting (43D)</td>
<td>NO</td>
<td>58</td>
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<tr>
<td>Housing Starts Per 1000 Households in 2007</td>
<td>7</td>
<td>171</td>
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</table>

**Other Community Facts**

<table>
<thead>
<tr>
<th>Data</th>
</tr>
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<tbody>
<tr>
<td>Total Population</td>
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<tr>
<td>Total Households</td>
</tr>
<tr>
<td>Workforce Within 30 Minute Drive Time</td>
</tr>
<tr>
<td>Percentage of Adults with a College Degree</td>
</tr>
<tr>
<td>Average Commute in Minutes</td>
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<tr>
<td>Median Household Income</td>
</tr>
<tr>
<td>Median Home Value</td>
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<tr>
<td>Residential Tax Rate per $1000</td>
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<tr>
<td>Average Distance to Acute Care Hospital in Miles</td>
</tr>
<tr>
<td>Hospital Name</td>
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<tr>
<td>Community Web Site</td>
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**Legislators**

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<tr>
<th>Name</th>
<th>District</th>
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</thead>
<tbody>
<tr>
<td>Jeffrey Perry</td>
<td>Fifth Barnstable District</td>
</tr>
<tr>
<td>Therese Murray</td>
<td>Plymouth and Barnstable</td>
</tr>
<tr>
<td>William D. Delahunt</td>
<td>Massachusetts Tenth District</td>
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</table>

Source: MassTrack - Tracking Massachusetts Support of Technology (Mass High Technology Council)