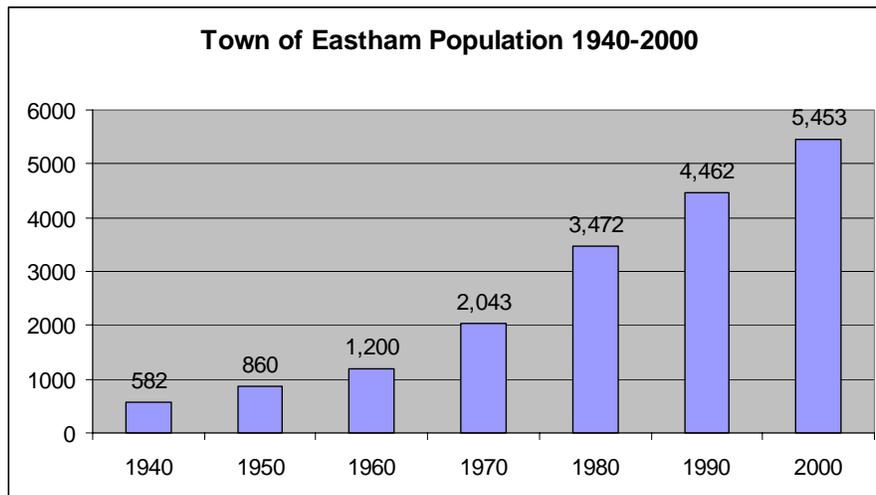


2.0 EXISTING CONDITIONS AND TRENDS

2.1 General Growth Trends in the Community and Project Area

Townwide Trends

The Town of Eastham's year-round population was estimated to be 5,453 in 2000. The number of full-time residents has risen steadily over the past 60 years averaging 46 percent growth each decade since 1940. This growth rate exceeds that of Barnstable County (Cape Cod) as a whole and all the surrounding communities except for Truro between 1990 and 2000.



Along with the increase in year-round population, the median age of residents has also increased steadily over the past 30 years, climbing from 41.7 in 1970 to 47.6 in 2000. This increase in age is reflected in the growing senior population. The Census reported in 1990 that the percentage of Eastham's over-65 residents amounted to 23.7 percent of the total population, which rose to 26 percent in 2000 (an increase of 10 percent).

Population Estimates and Projections for Selected Barnstable County Towns

Town	Population Change				Projected Population		
	1990 Population	2000 Population	Percent Change	Population Added	2010 Population	Percent Change	Population Added
Brewster	8,455	10,094	19%	1,639	15,623	55%	5,529
Chatham	6,579	6,625	1%	46	8,048	21%	1,423
Eastham	4,462	5,453	22%	991	7,280	34%	1,827
Harwich	10,275	12,386	21%	2,111	17,340	40%	4,954
Orleans	5,838	6,341	9%	503	7,672	21%	1,331
Provincetown	3,561	3,431	-4%	-130	3,549	3%	118
Truro	1,573	2,087	33%	514	2,295	10%	208
Wellfleet	2,493	2,749	10%	256	3,338	21%	589
Lower Cape Subregion	43,236	49,166	14%	5,930	65,145	33%	15,979
Barnstable County	186,605	222,230	19%	35,625	275,504	24%	53,274

Source: U.S. Census via Cape Cod Commission

In addition to year-round residents, Eastham has a large and growing seasonal population. In 1990 the summer population was estimated to be 21,800, and by 2000 it was conservatively estimated to be 27,500 (an increase of 26 percent).¹ This growth rate exceeds the year-round resident growth rate, which was 22 percent during the 1990s. Collectively, the seasonal and year-round population in Eastham has more than doubled over the last 30 years.

Coupled with Eastham's growing year-round population is the increase in year-round dwelling units, through both new construction and conversion of seasonal homes. The 1900 Census estimated that the total number of housing units in Eastham was 4,863, which increased to 5,535 in 2000, representing a 13.5-percent increase over this 10-year period. Of this total, only 2,396 homes (43 percent) were occupied by year-round residents, leaving 246 year-round vacant units and 2,893 seasonal units as potential conversions. Although the rates of conversion have not been predicted, there is evidence to show that such conversions have been occurring.²

In addition to having a large percentage of seasonal housing stock and an aging population (many approaching retirement age), other factors could influence these conversions, such as improved transportation and communications and the continued growth of the surrounding areas. According to the Local Comprehensive Plan, "the full conversion of seasonal to year-round housing units would have twice the potential impact on Eastham's municipal infrastructure, services, and finances than would result with the complete development of the remaining vacant residential land in town."

The possible impacts felt on the town by local and regional socioeconomic changes and projected growth will likely include increased local and through traffic, demand for additional services, the conversion of additional existing seasonal dwellings to year-round homes, and more proposals for new commercial and residential development.

NEVC Project Area Trends

The North Eastham Village Center (NEVC) Project Area encompasses about 25 percent of the town's land area but 35 to 45 percent of its population, or 1,909 to 2,454 residents. However, the number of households and visitors that potentially would utilize facilities and services extends beyond the immediate neighborhoods. These geographic areas are referred to as "trade areas" and defined below as well as other key socio-demographic characteristics of the NEVC Market Area.

Primary Trade Area – The "primary trade area" (PTA) for the proposed North Eastham Village Center can be defined as the geographic area from which 70 to 80 percent of Project Area's customers are drawn. For the sake of this analysis, the primary trade area for the NEVC Project Area is identified as a whole recognizing that individual businesses and sectors will draw different customer bases.

¹ "The summer population is not regularly estimated by a standard method. It consists of several groups of people including year-round residents, summer residents, shorter term guests and more transient weekenders. Of these, only the first group is regularly counted. Nonetheless the capacity to house people is limited. Assuming five people per house during a peak summer period plus 1,000-1,500 in motels, the total population is about 25,000. The Eastham Police Department has another estimate of 30,000 from the Town Clerk's office. Therefore, the adjusted estimate of 27,500 was made. The actual summer population on any particular day would likely fluctuate around this number." (Source: Town of Eastham Local Comprehensive Plan, 2002)

² Town of Eastham Local Comprehensive Plan, 2002

Key Socioeconomic 2006 Indicators of Primary Trade Area (PTA)

- The primary trade area has an estimated population of 9,997 with an estimated 4,702 households.
- Projected 2011 population in the PTA is expected to increase to 10,207.
- The median household income for those in the primary trade area is \$46,569.
- The median estimated buying power in the PTA is \$49,708.
- The median age in the PTA is about 51, which is higher than the state and national median.

The primary trade area was defined based on an analysis of regional population patterns, spending habits, socioeconomic trends, and local and regional competition. Input was also received from various business owners, property owners, and civic organizations. Combining these quantitative and qualitative sources, the NEVC primary trade area (PTA) was determined to be an area of about a 5-mile radius from the center of the Project Area at the intersection of Route 6 and Brackett Road. The PTA is illustrated in the figure below. (Appendix D contains various tables identifying demographic characteristics, existing businesses, and potential consumer spending patterns within the primary trade area.)



North Eastham Village Center Market Trade Area measures from the intersection of Route 6 and Brackett Road

The NEVC primary trade area takes in all of Eastham as well as portions of Orleans to the south and Wellfleet to the north. In terms of geographic area, the PTA is fairly small due to the presence of larger market areas in Orleans and Provincetown. Orleans is easily accessible from most residents in Eastham and within 10 miles of the Village Center.

SOCIOECONOMIC TRENDS IN THE NEVC PROJECT AREA			
Radius*	0.00 - 5.00 miles	0.00 - 10.00 miles	0.00 - 15.00 miles
Population			
2000 Census	9,702	24,737	59,251
1990 Census	8,405	21,335	51,481
Growth 1990-2000	15.43%	15.95%	15.09%
2006 Estimate	9,997	25,406	60,743
2011 Projection	10,207	25,923	61,704
Households			
Census			
2000 Households	4,477	11,045	26,738
1990 Households	3,746	9,251	22,494
Growth 1990-2000	19.51%	19.39%	18.87%
2006 Estimates			
Households	4,702	11,548	27,864
Families	2,894	7,380	17,623
Group Quarters Population	137	604	1,571
Housing Units	10,300	23,461	52,142
2011 Projections			
Households	4,858	11,916	28,591
Families	2,989	7,615	18,066
Group Quarters Population	139	620	1,618
Housing Units	10,657	24,196	53,561
2000 Tenure of Occupied Housing Units			
Owner Occupied	4,477	11,045	26,738
Renter Occupied	3,477	8,884	21,575
	1,000	2,161	5,163
Median All Owner-Occupied Housing Value			
2006 Estimate	\$413,811	\$433,015	\$415,902
2011 Projection	\$519,947	\$554,027	\$528,124
Average Household Size			
2000 Census	2.14	2.19	2.16
2006 Estimate	2.10	2.15	2.12
2011 Projection	2.07	2.12	2.10
Median Age			
2000 Census	47.6**	NA	NA
2006 Estimate	50.9	50.7	51.0
2011 Projection	53.4	53.2	53.4
Household Income			
2000 Average Census	\$54,085	\$57,358	\$55,896
2000 Median Census	\$40,219	\$44,949	\$44,435
2006 Median Estimate	\$46,569	\$51,282	\$51,158
2011 Median Projection	\$50,749	\$56,457	\$56,198
Per Capita Income			
2000 Census	\$25,377	\$25,691	\$25,461

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* Radius from Intersection of Route 6 and Brackett Road

** Townwide

Secondary Trade Area – The secondary trade area is the ring of influence for the Village Center beyond the primary trade area. Residents in the secondary trade area can get to North Eastham with relative ease and will make the trip for special business purposes or events. NEVC's secondary trade area includes those additional areas of Orleans and Wellfleet within 10 miles of the center of the Project Area. The total population for the secondary trade area (STA) in 2006 was approximately 25,406 with an estimated 11,584 households, a significant increase over the primary trade area. However, the influence of the secondary trade area on the NEVC Project Area is fairly limited because attractions are currently limited and there is significant existing competition with well established retail and service sectors. The North Eastham Village Center could gain a larger share of the customer base in the STA over time if it becomes a unique district with services and amenities distinguished from others in the region.

In addition to those living within 10 miles of the NEVC Project Area, the secondary trade area also includes the traveling public along Route 6. A reasonable estimate is that 50 percent of the vehicles traveling these corridors are currently passing through Eastham and could be potential customers in the future as the Village Center becomes more established.

Demographic Trends – This **population** in the primary trade area is projected to increase to 10,207 (about 2 percent) in the next five years. The estimated **median age** in the primary trade area is 50.9 years, which is about average for surrounding communities but significantly higher than the state and national medians. The number of **households** in the PTA has increase over the last five years from 4,447 to 4,702 (over 5 percent). This is a moderate growth trend compared to population and household increases between 1990 and 2000.

Wages and Income – The Census measures income by three different standards: Median Household Income (MHHI), Median Family Income (MFI) and Per Capita Income (PCI). In 2000, the **median household income** was \$40,219 in the primary trade area, which has grown by almost 16 percent to \$46,569 in 2006. However, the median household income in the PTA is lower than the secondary and tertiary trade areas and is expected to remain lower over the next five years.

Jobs-to-Housing Ratio – The NEVC primary trade area has a jobs-to-total-housing-units ratio of approximately 0.75 (i.e., there are 0.75 jobs for every home within the PTA). This is on the low side compared to the secondary trade area, which has a jobs-to-housing ratio of 0.87. A 1.5+ jobs-to-housing units ratio is considered optimal by most measurements. The PTA's low ratio is an indication that employment opportunities are needed locally while Orleans and other down-Cape communities may serve the role of regional employment centers. Also, improving opportunities for local residents to find jobs within the community is an important quality of life and community sustainability qualifier.

NEVC Project Area Residential Growth Issues & Opportunities

- The Brackett Landing housing development on the north side of Brackett Road is a 40B project under construction with 20 single family homes and 10 duplexes (40 dwelling units total) and 3 commercial lots fronting the road. This may be a model for future mixed use and income projects in the NEVC.
- The number of seasonal houses has declined while the number of year-round homes has increased, many due to conversions.
- Both ownership and rental opportunities for affordable housing, workforce housing, and senior housing facilities are desired by the community.

2.2 Assessment of Relevant Plans and Regulations

An assessment of existing town plans, policies, and regulations was made to determine the potential support for mixed-use and mixed-income commercial and housing developments in the North Eastham Village Center Project Area. This assessment included the following municipal planning documents.

The Local Comprehensive Plan

The town plan was adopted in October, 2002. It provides the framework for community planning decisions and development reviews. The plan includes **goals and policies**, an **inventory** of the town's resources, an **analysis** of present and future concerns, and **recommendations** which reflect the community's goals and policies. The plan also includes specific strategies designed for **implementing** its recommendations.

Eastham's Overall Goals and Related Needs from the 2002 Comprehensive Plan

- Preserve the historic and rural character of the town
- Protect/improve water quality and supply
- Ameliorate impact of Route 6 on rural town character
- Reduce commercial sprawl and improve the appearance of commercial areas (Route 6)
- Improve Town Hall and Brackett Road areas
- Provide affordable year-round housing
- Provide quality service for all residents including schools, recreation facilities, and police and fire services
- Improve sewage disposal systems
- Coordinate public and nonprofit services
- Protect natural features and open space
- Protect wetlands and plant habitat/wildlife areas
- Encourage recreational and commercial marine activities
- Protect coastal areas from degradation
- Support sustainable economic development, year-round job creation
- Encourage conservation and reduce electric energy consumption
- Encourage the development and coordination of regional public transportation
- Promote and extend, if necessary, post-secondary education opportunities to enhance the town's human resources

In addition to the overall goals, there are several policies and recommendations in the comprehensive plan that more specifically support the concept of creating a North Eastham Village Center.

Under the Land Use and Growth Management component, *Section II - Goals, Policies, and Existing Conditions*, the comprehensive plan establishes goals and performance standards. These policies are consistent with the current regional policy plan of the Cape Cod Commission and several are directly related to principles of establishing a new Village Center:

- Compact forms of development, such as cluster development and, where appropriate, mixed-use residential/commercial development, shall be given preference by the special permit granting authority in order to minimize further land consumption and to protect open space. (1.1.1)
- Creation or extension of strip development shall not be permitted. Reuse,

redevelopment, or infill within existing strip developments in a way that does not extend the linear nature of the development or increase traffic conflicts may be permitted. (1.1.2)

- All development and redevelopment in village centers, downtowns, growth/activity centers, and growth incentive zones shall be constructed with the minimum feasible setback from the street in conformity with the setback of adjacent structures in order to encourage village-style development and a more comfortable and secure pedestrian environment. (1.1.3)
- The building and layout of parking lots shall reinforce the character of existing buildings and traditional village streetscape patterns. Parking shall be located to the rear or the side of a building or commercial complex in order to promote traditional village design in commercial areas unless such a location is unfeasible or would have an adverse or detrimental impact on environmental or visual features on the site. Parking structures shall be provided when appropriate to reduce the amount of paved parking areas supporting a proposed development, provided the structure meets the goals of the Commission's design manual, *Designing the Future to Honor the Past: Design Guidelines for Cape Cod, Technical Bulletin 96-001*. The use of shared parking, on-street parking, and community parking lots in village areas, growth/activity centers, and growth incentive zones shall be provided, where feasible, to reduce the amount of land devoted to parking. (1.1.4)
- Affordable housing should be provided as part of residential and commercial development. Particular attention should be given to locating affordable housing in or near growth/activity centers and growth incentive zones and convenient to transportation corridors. (1.1.6)
- Where appropriate, use of transfer of development rights should be encouraged in order to concentrate development in growth/activity centers and growth incentive zones with adequate infrastructure and to preserve open space in outlying areas. (1.1.7)
- All development plans should protect open space and minimize environmental and community impacts of growth and to promote compact forms of residential and commercial development. (1.1.9)
- All commercial subdivisions of land shall cluster the proposed development unless inconsistent with local bylaws. Cluster plans shall use site designs that maximize contiguous open space, respect the natural topography and character of the site, and employ wastewater treatment alternatives to allow more compact development. (1.1.11)
- The creation of affordable rental and ownership housing should be encouraged through infill, redevelopment, or conversion of existing structures and sites, and the creation of accessory apartments. Adequate infrastructure should support these efforts in order to accommodate greater residential density. (1.1.13)
- Appropriate redevelopment and infill within growth/activity centers and growth incentive zones should be encouraged. The development of land in outlying areas should be reduced through downzoning, transfer of development rights, open space purchases, or other techniques. (1.1.14)
- Efforts should be made to improve the appearance of existing strip development through frontage buildings, sign control, infill, relocation of parking, landscaping, and undergrounding of utilities, consistent with the

recommendations of *Designing the Future to Honor the Past: Design Guidelines for Cape Cod, Technical Bulletin 96-001*. (1.1.15)

Town Land Use Regulations

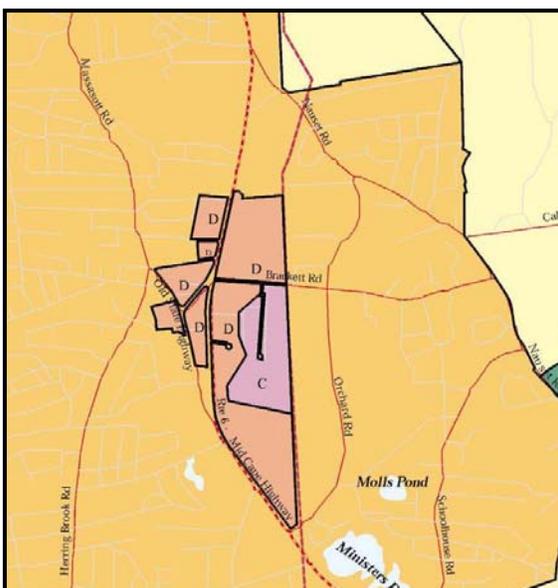
The Town of Eastham Zoning Bylaws were comprehensively revised in 1988 and most recently amended in 2003. While the Local Comprehensive Plan is highly supportive of the concept of creating a Village Center in North Eastham, the zoning bylaws pose a major obstacle in implementing the components of a traditional village center. A portion of the NEVC Project Area was down-zoned in the late 1990s from commercial to residential use. Some of the major obstacles are as follows:

- Only one family dwelling and duplex dwelling is permitted in District A – Residential, limiting the potential for multifamily affordable home ownership and rental opportunities unless presented as a 40B application (Section V).
- District C – Industrial does not allow for office uses (by right or special permit) that may be desirable in addition to light industry in the Project Area. There are also no specific performance standards for permitted or special permit uses in the district which could be incompatible with other allowable uses in the district (Section V).
- District D – This district provides for 50% of building spaces to be allowed for residential use above business uses. However, retail and service uses are fairly limited and none are allowed by special permit. There are also no performance standards for certain uses that could potentially be incompatible with other allowable uses in the district (Section V). The uses permitted in District E – Limited Commercial (which is not in the NEVC project) area should be allowed at least by special permit in District C (Section V).
- Certain key existing and potential future uses in the NEVC Project Area are specifically prohibited, such as hotels, motels, resorts, conference centers, and restaurants (drive in) (Section VIII, E., and F.). These are important uses in a traditional village center and need to be considered at least by special permit. Additionally, incentives should be in place to encourage existing restaurants and hotels in the Project Area to make renovations, expansions, and other improvements consistent with the desired design characteristics of the village center.
- Lot size requirements for new single-family and duplex dwellings in District A – Residential are 40,000 and 80,000 s.f., respectively. Year-round single-family and duplexes can be allowed on 40,000 s.f. lots after site plan review (Section IX., A.1. and 2). These large lots are not consistent with traditional village neighborhoods, which would be more on the order of 5,000 to 10,000 s.f.
- Lot size requirements for business structures in the A, C, and D districts are a minimum of 40,000 s.f. (Section IX., A.3). These large lots are not consistent with traditional village centers, which would be more on the order of 5,000 to 10,000 s.f.
- The front setback for residential buildings is 50 feet from any public way (Section IX.B.1). This is appropriate for major arterials such as Route 6, but on smaller village neighborhood streets, a more typical setback would be about 20 feet.

- In Districts D – Retail Sales/Service the front setback is 100 feet from all ways (Section IX.B.2). This large setback is essentially incompatible with a traditional village center design that would allow for (or even require) buildings to be brought up to the street line to create a pedestrian environment and ensure parking is located behind or to the side of the building.
- The parking requirements (Section X) in terms of layout, required spaces, and surfacing are generally adequate for a traditional village center. However, to facilitate traditional village design, flexible provisions should be added to ensure parking is located behind or to the rear of primary buildings, there are shared access points and internal connections/circulation, required spaces for shared lots or nearby public parking are reduced, and satellite parking exists.
- Under the landscaping requirements (Section XI) sidewalks should be required for all new development with a distinction between larger, more formal sidewalks for commercial and civic spaces, and smaller sidewalks for residential areas. Landscaping in front of commercial and civic spaces should be more hardscapes and formal street tree plantings to encourage pedestrian and outdoor activities.

In support of a traditional village center development in the NEVC Project Area are the following zoning bylaws:

- The site plan review provisions for commercial and residential development (Section XIII and XIV) appear to be adequate to support the proposed village center.
- The procedures for the demolition of historically or architecturally significant building (Section XVII) appear to be adequate but would probably have limited application in the Village Center.
- The sign code (Section XVIII) does not prohibit appropriate business signs for a traditional village center.



A number of people in the community feel that restrictive zoning regulations has led to poor building design and site planning (i.e., large setbacks, disconnected parking, excessive curb cuts, and poor signage). In particular, a 100-foot setback from abutting streets in the Commercial District lends itself to strip development and is a real deterrent to achieving a traditional mixed use village center. It has also been suggested that more Zoning District C may be needed to prevent existing and new businesses from going to other communities.

The town should strongly consider creating an overlay district that establishes incentives for traditional village development patterns through density

Zoning Districts in the NEVC Project Area

increases, reduced dimensional standards, and expanded mixed uses. In exchange, the overlay district would facilitate quality development with standards and guidelines for attractive building design, landscaping, parking, pedestrian amenities, and streetscape enhancements. This would apply to the Commercial Districts in the Project Area and possibly the Residential Districts as well.

Several zoning amendments are recommended in the Local Comprehensive Plan that would help to facilitate the development of a traditional village center. Generally speaking the plan suggests that regulations, including but not limited to lot sizes, parking requirements, undergrounding of utilities, setbacks, and road widths, should be revised to permit village-style and mixed residential/commercial uses. Such development should be located in areas served or planned for service by appropriate wastewater treatment systems and other infrastructure. The plan also recommends that the town consider making appropriate town-owned land available for agriculture, open space, and clustered affordable housing.

Specific actions to be taken on the land use regulations that apply to the development of a village center are as follows:

Zoning Actions

- Adjust zoning to accommodate recommendations of the land use plan, e.g., adopt a Highway Residential District and allow for mixed-use developments in this district.
- Augment performance standards, e.g. for lighting, noise, and odors, by revising the zoning bylaws.
- Amend the zoning bylaws to add language on curb cut control and develop a comprehensive curb cut strategy for Route 6. This strategy should be closely coordinated with the Cape Cod Commission and Massachusetts Highway Department to complement the planning activities of these entities.
- Revise the zoning bylaws for building and parking setback and landscaping requirements for commercial developments.
- Study the possibility of working with NStar and the state and consider funding for putting utility lines underground along town roads or on town-owned land in any area where the required poles, wires, cables, aerial transformers, and other related electrical and telecommunications equipment are deemed visually intrusive and/or a safety hazard.
- Amend the zoning bylaws to create a definition of “strip” development and make it a prohibited use in the table of use regulations.
- Develop a zoning amendment that provides incentives for shared access to developments by way of zero side lot lines or reduced parking requirements.
- Prepare plans for the Town Hall and Brackett Road areas, to include sidewalks, footpaths, parking, pedestrian crossing, traffic mitigation, lighting, landscaping, and undergrounding of overhead utilities.
- Develop a comprehensive land use strategy to address existing and future traffic conflicts along Route 6. This strategy should minimally include exploring the following:
 - Purchasing vacant land as protected open space
 - Increasing lot frontage requirements on Route 6

- Increasing lot sizes for residential development on Route 6
 - Placing strict limits on lot coverage for commercial uses on Route 6 with incentives for shared curb cuts with adjacent residential properties
 - Establishing measures to limit buildout in the Route 6 corridor, such as rezoning commercial areas for low-density residential uses
 - Creating greater incentives for infill and redevelopment in areas where coordinated access can be provided
 - Considering a transferable development rights system as a means to relocate existing, poorly sited commercial development, and better accommodate future development potential in the corridor (using the Commission's model bylaw)
- Explore measures to limit buildout throughout the town including downzoning, land acquisition, and residential transferable development rights as a means to send residential development to proposed mixed-use centers where residential units, including affordable units, could potentially more effectively be served by advanced wastewater systems and public transit.

Subdivision Actions

- Amend its subdivision rules and regulations to require submission of a preliminary cluster plan for new development of five or more lots.
- Amend its subdivision rules and regulations to require plan sheets showing regrading, landscaping, and erosion control methods to be used on the property.

2.3 Property Assessment and Trends Analysis

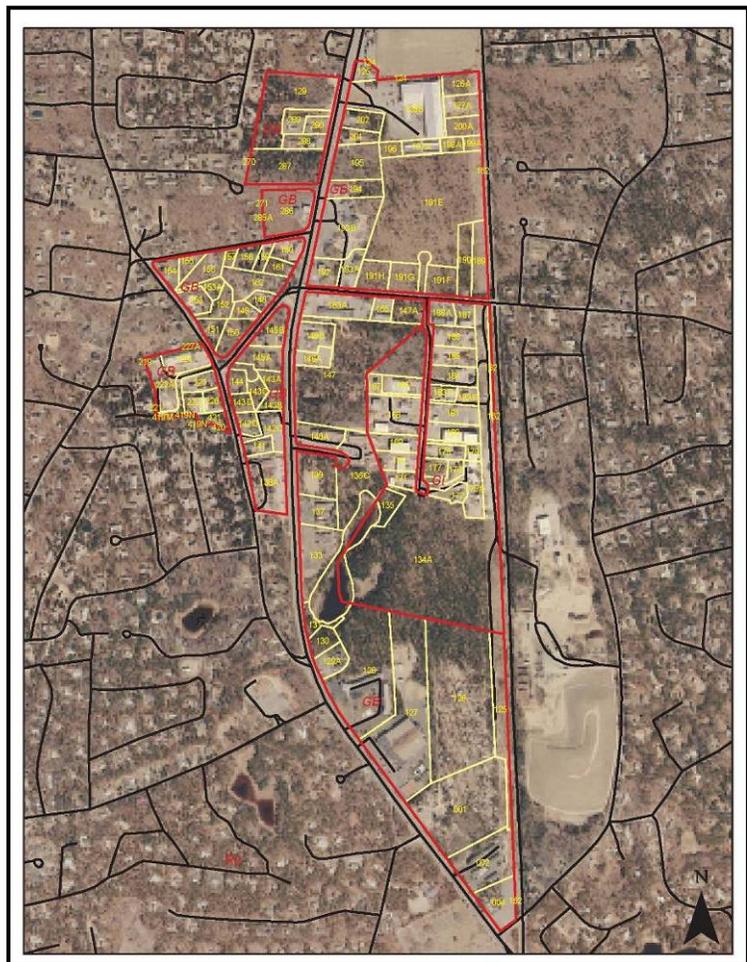
Property records were evaluated in the North Eastham Village Center (NEVC) Project Area based on town records and on-site observations. Using the assessor's maps and aerial photography from the MassGIS system, property boundaries and building footprints mapped illustrating property characteristics such as ownership, general conditions, current uses, dimensional measurements (lot size, setbacks, height, square feet, frontage, FAR), and other on-site features such as parking, pedestrian amenities, landscaping, and general architectural styles. (The Existing Conditions, Issues and Opportunities Maps are included in *Section 3: Current Land Use Issues & Future Opportunities* and the full property inventory is in Appendix C.)

General Property Characteristics – In terms of this analysis, the North Eastham Village Center Project Area includes all of the lands in the area of Route 6 between Old Orchard Road to the south and Nauset Road to the north as illustrated on Map 1.1. This includes all commercial, industrial and residential properties along Route 6, Brackett Road, Holmes Road, and Old State Highway, as well as surrounding neighborhoods. This area is further broken down into **sub-areas** including the Southern Gateway Area, Village Center Core Area, Commercial/Industrial Redevelopment Area, Northern Gateway Area, and Village Neighborhood Area which are described in detail in Section 3. The **Village Center Core Area** is the focal point of the NEVC Project Area and contains the land centered on the intersection of Route 6 and Brackett Road, including the town-owned Purcell property.

NEVC Existing Property Characteristics			
Characteristic	Village Center Core Area	Remainder of the NEVC Project Area	TOTAL
No. of Properties	106	1,421	1,527
Total Acreage	73.1	1,120	1,194
Ave. Parcel Size	1.38	1.93	1.80
No. of Buildings	96	1,339	1,435
Total Net Building S.F.	211,084	1,991,628	2,202,712
Ave. Net Building S.F.	2,574	3,277	5,851
Ave. FAR	0.09	0.08	NA
Ave. Building Age (years)	41	40	NA
Ave. Frontage	181	175	NA
Ave. Front Setback	85	115	NA
Total FY06 Taxable Value	\$30,394,100	\$552,204,910	\$582,599,010
Ave. FY06 Taxable Value	\$295,088	\$462,886	NA

In all, there are 1,527 properties totaling 1,194 acres in the North Eastham Village Center Project Area. However, the vast majority of the lands are located in the neighborhoods. The Village Center Core Area makes up a relative small portion of the overall area with 73 acres (6 percent of the total). Appendix B and C provide detailed information regarding existing property characteristics by sub-area.

Dimensional Characteristics – The average lot size and frontage dimensions for existing properties and buildings in the Village Center Core Area are less than required under the zoning bylaws (40,000 s.f. minimum lot size, 100-foot setback for commercial, and 50-foot setback for residential). Other average dimensions such as frontage and floor area ratio (not addressed in the zoning) are not consistent or compatible with the desired traditional village center design. Generally, these dimensional characteristics, as well as the current zoning requirements pertaining to the Project Area, represent a strip development pattern. Dimensional requirements are one of the more critical amendments that need to be addressed in the zoning in order to facilitate traditional village center design.



NEVC Project Area Parcel and Aerial Base Map

Commercial Uses – The property records indicate that there are 96 parcels in the NEVC Project Area identified as commercial uses under 16 different classifications. These parcels amount to approximately 178 total acres. Those parcels in the general commercial categories such as retail, office, and services have an average lot size of 41,000 square feet.

The patterns of commercial property distribution have occurred primarily along Route 6. Businesses are generally complementary, but there are no true commercial business clusters except for restaurants and hotels that cater to the traveling public.

Residential and Recreational Uses – There are only 83 parcels amounting to 64 acres classified as residential use in the Village Center Core Area. The average lot size of these properties is 34,174 square feet. The Village Neighborhood Area contains 1,287 parcels in residential use of which the vast majority (1,057, or 82 percent) contain single-family homes. The average lot size of these residential parcels is 24,779 for single-family homes and 36,191 for duplexes, far below the current zoning requirements.

According to the comprehensive plan, there are approximately 1,200 acres of vacant developable land and land with the potential for additional development townwide. Of this total, only about 195 acres (16 percent) are in the NEVC Project Area. The potential residential buildout for Eastham under the current zoning is approximately 1,150 additional housing units resulting in a total of 6,000 units at buildout. If the average annual rate for the last five years of 58 units/year were used, Eastham would reach residential buildout in 2015. Additionally, the buildout figures do not account for approximately 400 grandfathered lots that are below the current zoning requirements but are protected under MGL.Ch.40A. While these grandfathered lots could be built without regard to current zoning, they are subject to other town bylaws or regulations, which in combination with the lack of sewer or water service will reduce that number considerably.³

There is very little diversity in the NEVC Project Area or townwide housing stock, and the current regulations make it difficult to improve. The latest residential development in the NEVC Project Area is Brackett Landing which includes a series of duplexes on smaller lots. While this improves the diversity, it is a 40B project and would not be allowed under the current zoning requirements.

In terms of recreational opportunities, there are few in the NEVC Project Area. The most prominent are the Cape Cod Bike Trail and Willy's Fitness Center, both of which are well used by locals as well as visitors. Besides the bike trail, there are few public spaces and no formal parks in the Project Area. A typical planning goal for recreational access would be for every home to be within ¼ mile of a public open space. These may be simple picnic and playgrounds or more formal parks and sports facilities. With a large percentage of local residents living in the NEVC Project Area, this is an important factor in future planning of the Project Area. Future recreational uses should include trails and open spaces within the core area and connections to surrounding neighborhoods.

Property Values and Tax Revenues – NEVC Project Area properties have a collective taxable value of \$582 million in Fiscal Year 2006. This makes up a significant portion of the townwide property values. However, the NEVC Core Area only accounts for about \$30 million (5 percent). This area should provide higher tax value in the future as property is developed and redeveloped. However, the potential positive impact on the town's tax base, may be somewhat modified by the need for public enhancement, such

³ *Local Comprehensive Plan, 2003*

as infrastructure and streetscape improvements, that would draw investment to the Project Area.

Development Issues & Opportunities in the Village Center Core Area

- As of August 2006 the NEVC Project Area business inventory included a total of 133 commercial, professional, and government establishments with food, drink, and retail shops making up the bulk.
- Most existing commercial developments have limited landscaping along public roadways and internally within parking lots and around the buildings.
- There are several new examples of attractively designed commercial buildings in the NEVC Core Area. However, typical site planning characteristics of limited landscaping, large curb cuts, and parking in front of the building create a sense of strip development rather than a village center.
- Key issues to the community include retaining and reorienting the post office area, attracting commercial uses that contribute to the Village Center and complement existing businesses, providing public restrooms, and improving signage.
- Existing and future commercial activities should provide services to local residents as well as attract visitors.
- In addition to commercial activities, the Village Center should provide social and health services, and supportive services for the elderly.
- A streetscape plan for Route 6 and Brackett Road should be created to establish a formal planting scheme for green strips and street trees.

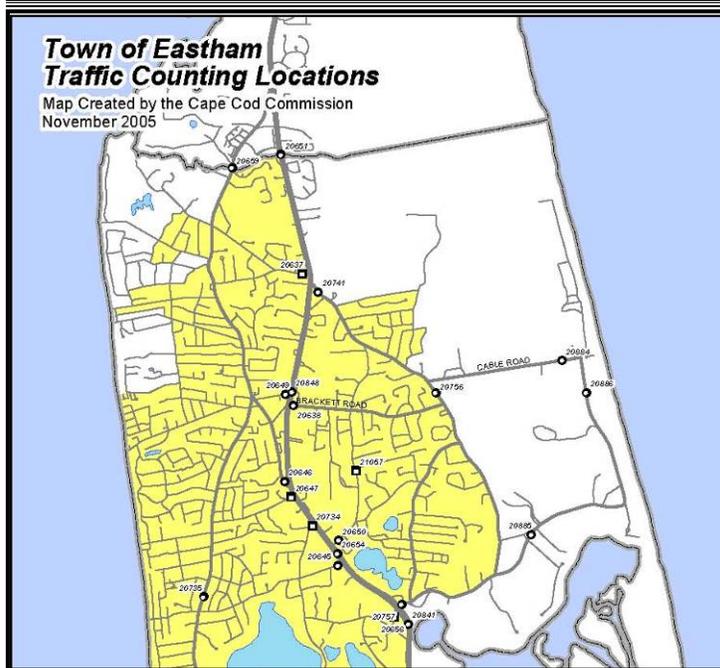
2.4 Traffic Circulation and Parking Evaluation

Existing traffic and circulation patterns were evaluated to determine how various methods of travel are performing, interacting, conflicting, or meshing in the NEVC Project Area. Information was collected from town officials, the MassHighway District Office, and the Cape Cod Commission to identify specific trends, issues, and potential transportation projects in the area.

Roadway Network and Conditions – There are an estimated 136 public and private roads in the North Eastham Village Center Project Area. Most of these are small collector and access roads serving neighborhoods and primarily residential areas. The major streets within the North Eastham Village Center Project Area are Route 6, Brackett Road, Old County Road, Massasoit Road, Oak Road, Holmes Road (private), Main Street (private), Old Orchard Road, Great Pond Road, and Nauset Road.

Public roadways in the Project Area are generally in good condition. Brackett Road is probably the one local road in need of improved traffic flow. It is a narrow road (approximately 22 feet wide) with no shoulders or curbing, and open drainage on each side. There are areas of erosion along each side of the roadway, and the pavement is in poor condition in certain locations.

Two key private roads in the NEVC Project Area are in poor condition. One is Holmes Road, which services the only industrial zoned area in Eastham. There are no shoulders or curbing, and pavement is deteriorating. With a large percentage of truck traffic and additional traffic volumes that may occur in the future as the Village Center Plan is development, the town should consider converting Holmes Road to a public road and making necessary upgrades. Main Street, serving Main Street Mercantile, is in average condition but may be key in the future planning of the Village Center and should be considered as a candidate for designation as a public road with upgrading.



Route 6 is a major four-lane arterial which bisects the Project Area while simultaneously providing the only major artery or connecting road for residents. Commercial and residential development is scattered along this corridor. One of the main issues with Route 6 is the quantity of curb cuts. Other problems associated with this route include the visual appearance of existing commercial uses and their associated curb cuts, which add to the congestion of traffic primarily during the summer season.

Brackett Road intersects with Route 6 in the core area of the Village Center. The road serves as a major collector and access point to Route 6 from the neighborhoods on the east side of the Village Center. Brackett Road also provides direct access for retail centers, the Holmes Road industrial area, and a new 44-unit residential development (Brackett Landing). Additionally, the Cape Cod Rail Trail uses Brackett Road as the key connection to Route 6 and the Village Center. There is potential for additional mixed-use and/or residential development at somewhat higher density. To accommodate these current and potential future uses, improvements in the immediate vicinity of the intersection of Brackett Road and Route 6 should include enhanced landscaping, undergrounding of utilities, pedestrian and bus passenger amenities, and pedestrian crossings.

Traffic Volumes – Many local residents feel that traffic in North Eastham, particularly on Route 6 and Brackett Road in the summer, is reaching a critical stage. MassHighway and the Cape Cod Commission collect regular traffic counts throughout Barnstable County including several locations in the NEVC. The table below shows the most recent average annual daily traffic (AADT) year-round and for peak season.

The highest recorded traffic counts in the Project Area are on Route 6 at Oak Street. The average annual daily traffic here is about 23,000 vehicles per day (vpd), which increases to about 30,000 vpd during peak season in July and August. This represents a 28-percent increase in daily traffic during the summer months.

Brackett Road has an average annual traffic volume of about 3,500 vpd, which increases to about 4,500 (29 percent) during the peak season. While this is a low traffic count by comparison, the condition of the roadway, adjacent commercial uses and access points, and limited capacity at the intersection increases the congestion issue.

Annual traffic volumes on the major roadways are comparable with other small to medium-sized village centers. For example, comparable traffic can be found in nearby village centers such as downtown Hyannis, Mashpee Commons (Rt. 28 and 151), Falmouth, and Plymouth. The volume of traffic is not as significant an issue as the ability to disperse traffic through alternate routing and internal circulation. This sort of traffic

flow is common in more established village centers. While local residents know how to bypass portions of Route 6 on a busy summer day, visitors may not.

North Eastham Village Center Project Area AADT and Peak Season Traffic Counts					
Station	Location and Year	Year	Seasonal Adjust. ADT	Peak Hr. Vol.	AADT
20638	Brackett Rd. E. of Rt. 6	2005	4,513	466	3,475
		1995	5,224	499	3,918
20645	Kingsbury Beach Rd. W. of Rt. 6	2004	994	84	775
		1996	728	67	626
20646	Massasoit Rd. W. of Rt. 6	2002	3,244	260	2,530
		1996	2,263	189	1,946
20649	Oak Rd. W. of Rt. 6	1996	1,146	94	986
20650	Old Orchard Rd. E. of Rt. 6	2005	1,567	161	1,207
		1995	1,128	125	846
20654	Rt. 6 N. of Kingsbury Beach Rd.	2005	31,594	2,780	24,327
		1997	30,577	2,461	23,086
20741	Nauset Rd. (N. End) E. of Rt. 6	2000	3,643	374	2,805
		1995	2,160	206	1,620
20757	Nauset Rd. (S. End) E. of Rt. 6	2004	6,286	640	4,903
		1999	6,393	663	4,859
20848	Rt. 6 N. of Oak Rd.	2001	29,808	2,386	23,250
		1996	26,304	2,317	19,728

Source: Traffic Data provided by the Cape Cod Commission

There are few internal circulation options currently in the NEVC Project Area. However, the concept plan for the NEVC Core Area (Section 4) identifies several possible methods of improving circulation through internal roadway connections, extending current roads such as Holmes and Main Street, and new frontage roads along sections of Route 6 to reduce the number of turning movements on and off the highway. Improving internal circulation is one of the primary improvements in developing the Village Center.

Key Intersection Issues – There are six key intersections in the NEVC Project Area:

- **Route 6 and Brackett Road** – This intersection is the heart of the NEVC Core Area. Currently, Route 6 includes two travel lanes in both directions. This cross section appears to function adequately except during peak season. A key improvement would be to add a right turn lane on the northbound approach onto Brackett Road. The other key issue is that the large cross section poses a challenge to pedestrians and bicycle riders. A painted pedestrian crosswalk combined with a pedestrian phase in the signal system would be recommended to improve safety.

The main issue on Brackett Road is the absence of a left turn lane at the intersection of Route 6. The town has been working with Weston & Sampson Engineering on plans for improving Brackett Road at the intersection, which would include a left turn lane onto Route 6 as well as shoulder improvements. (Preliminary plans are available in the Town of Eastham Department of Planning and Zoning). While these improvements would require the acquisition of some additional private property, it is a critical issue for the future development of the Village Center and is highly recommended.

- **Route 6 and Old Orchard Road** – This intersection serves as the southern gateway to the NEVC Project Area. Old Orchard Road serves as a primary collector for neighborhoods on the east side of the NEVC Project Area. The Cape Cod Bike Trail underpasses Route 6 and crosses Old Orchard Street

on the south end, which is a popular stopping point for bicyclists. Recommended improvements include pedestrian and bicycle safety enhancements, gateway treatments (i.e., landscaping and signage), and possibly a traffic signal in the future. The advantages of installing a traffic signal combined with a pedestrian phase at this intersection would be a safer environment for walkers and bicyclists and for traffic turning onto Route 6 from adjacent neighborhoods and commercial developments. It would also create gaps in traffic flows (or platoons) that would allow for easier access to and from the highway from commercial developments and other cross streets to the north.

- Route 6 and Great Pond Road – This intersection provides access to neighborhoods south and west of the NEVC Project Area. Great Pond Road is forked at the intersection to improve separation and access. The main issue here is the speed of traffic on Route 6 which can be hard to judge from Great Pond Road. No major changes are recommended for this intersection except for the possibility of a yellow flashing warning light approaching the intersection in both directions from Route 6.
- Route 6 and Massasoit Road – This intersection provides access to the neighborhoods on the west side of the NEVC Project Area. The alignment of the intersection is poor, and visibility is limited by a bend in Route 6. The speed of traffic also poses a danger to vehicles entering the highway. This intersection may be a candidate for signalization and realignment in the future. It could also be aligned with a future extension to Holmes Road from the east side of Route 6.
- Route 6 and Nauset Road – This intersection is located at the northern gateway to the NEVC Project Area. Traffic volumes on Route 6 in this area are significantly less than points south, and traffic on Nauset Road is only moderate. No significant improvements are recommended at this intersection except for some gateway treatments such as landscaping and directional signage.

Pedestrian and Bicycle Environment – Overall, the pedestrian environment is poor in the NEVC Project Area. The only sidewalk is a 5-foot asphalt sidewalk along the west side of Route 6 through the Project Area with no green strip or street trees to provide a buffer between pedestrians and vehicles. This sidewalk does not service the Project Area well as the majority of commercial developments are located on the east side of Route 6. There is no sidewalk on Brackett Road and very little space on the side of the road for safe pedestrian and bicycle travel.

Sidewalk and bicycle lanes and trails are needed throughout the NEVC Project Area to make connections to existing and future developments and points of interest. The most immediate concern in the core area is on the east side of Route 6 from Willy's Fitness Center to the Seadog Restaurant, and on Brackett Road from the Route 6 intersection to the Cape Cod Bike Trail. Additionally, it is recommended that an 8-foot combined bikepath and sidewalk be installed on the north side of Brackett Road and a 4-foot sidewalk be installed on the south side connecting to adjacent developments and to the Cape Cod Bike Trail. Pedestrian cross walks and signal phases should also be installed at the Route 6 and Brackett Road intersection on all approaches.

Intermodal Composition – Public transportation service is limited in the NEVC Project Area with no formal bus stops or turn outs. Bus service, combined with other alternative means of transportation such as sidewalks and bikeways, are an important element in

the planning of a future village center. Designated bus stops and shelters should be located along Route 6 and Brackett Road in key locations such as at the intersections of Old Orchard Road, Four Points Sheraton, Route 6, Village Green Plaza, Holmes Road/Brackett Landing, Willy's Fitness Center, and Nauset Road.

Parking and Streetscape Evaluation - An evaluation of property site plans, records, and on-site observation indicated that parking is generally adequate and well distributed around the NEVC Project Area. While there are certain locations during the busy season, such as the Village Green Plaza, that may be at capacity during certain types of the day, the vast majority of private commercial developments were observed to have ample parking available to local and visiting customers.

A key issue for the NEVC Project Area is not the amount of parking spaces available but the amount of area on a lot-by-lot basis that is wasted due to large and multiple curb cuts, poor internal parking design, minimal internal connections or shared parking, excessive setbacks, and parking located in front of the buildings rather than behind. These issues are prevalent throughout the NEVC Project Area and are a strong visual indication of strip development and poor quality to the traveling public. Additionally, multiple curb cuts and limited internal access requires more turning movements to and from Route 6 further creating congestion and safety concerns.

Combined with poor parking design on many commercial lots is the limited amount of streetscape along the roadways or internal landscaping. Public streetscape enhancements, as well as gateway treatments and directional signage, is also very limited and needed throughout the NEVC Project Area.

Enhancing the walking, biking, or driving experience is a critical issue in the development of the Village Center Core Area. Improving streetscapes and existing parking lots (i.e., reduced curb cuts and shared access, internal circulation improvements, shared parking, off-site parking, and landscaping) are an important step in the process. *Section 3: Current Land Use Issues & Future Opportunities* identifies on a lot-by-lot basis the current site plan layout and issues as well as potential improvements. These are further illustrated by the *Existing Conditions, Issues, and Opportunities Map Series* also in Section 3 of the report.

Transportation and Parking Improvement Opportunities

- Potential traffic calming improvements are needed throughout the NEVC Project Area to improve aesthetic value, pedestrian and bicycle safety, visitor experience, and investment opportunity.
- The improvement of the Route 6 and Brackett Road intersection is a primary concern. This should include new turn lanes, pedestrian crossings and signal phases, sidewalks, and Streetscaping.
- The widening of Brackett Road is necessary to include a left turn lane onto Route 6, a sidewalk on both sides, a bikepath on the north side, and streetscape improvements. This would involve a taking of 4 feet.
- New internal roads from Rt. 6 to Holmes Road and other quadrants of the intersection with Brackett Road are needed to disperse local traffic and alleviate congestion.
- Several existing developments along Route 6 and Brackett Road have multiple and excessively wide curb cuts. There a few shared curb cuts in the Project Area which would provide greater traffic and parking efficiency.
- Frontage roads and integrated parking facilities on existing and new developments in the Project Area would relieve congestion
- Safe bus stops, pedestrian improvements, and bicycle connections are desired by the community and an important element in the development of a new village center.
- Gateway and directional signage is needed at key locations in the Project Area.
- Planned and potential projects should be included in the Regional Transportation Improvement Program.

2.5 Infrastructure Assessment and Alternatives

Water and Wastewater – There are currently no public water or wastewater systems in the North Eastham Village Center Project Area. All commercial and residential developments are using private or small communal water wells and septic systems. The lack of this infrastructure could severely limit the potential to develop a traditional village center. Providing future town wide public water supply in phased implementation and wastewater alternatives to private systems (such as communal systems and package treatment plants) to service existing and future land use scenarios is a more efficient and environmentally sound manner of growth, particularly in designated areas such as the Village Center.

Assumptions have been made to determine the total design flow for potential on-site water and wastewater treatment facilities that would service the NEVC Project Area. Appendix C contains the resulting table of sewage flow generated by each parcel under current and future conditions. The objective is to determine a total design sewage flow for a North Eastham Village Sewer Service District. This proposed district is further divided into three subdistricts based on current land use, topography, and future potential. The total flow is to be used as the design flow for the on-site wastewater treatment plants.

The existing flow was determined by evaluating the building description and net square footage and using corresponding Massachusetts Department of Environmental Protection Title V unit flow for the building type. The square footage was manipulated to determine the number of corresponding units. The total existing flow was then computed.

The determination of the future flow is based on the proposed use of the vacant parcels to a level similar to existing high-density areas. It was assumed for proposed commercial property usage, the net building square footage would equal one third of the total parcel area. Proposed development plans were also used in determining the number of buildings and use for the mix-use areas. Corresponding Title V unit flows were used to calculate the total future flow.

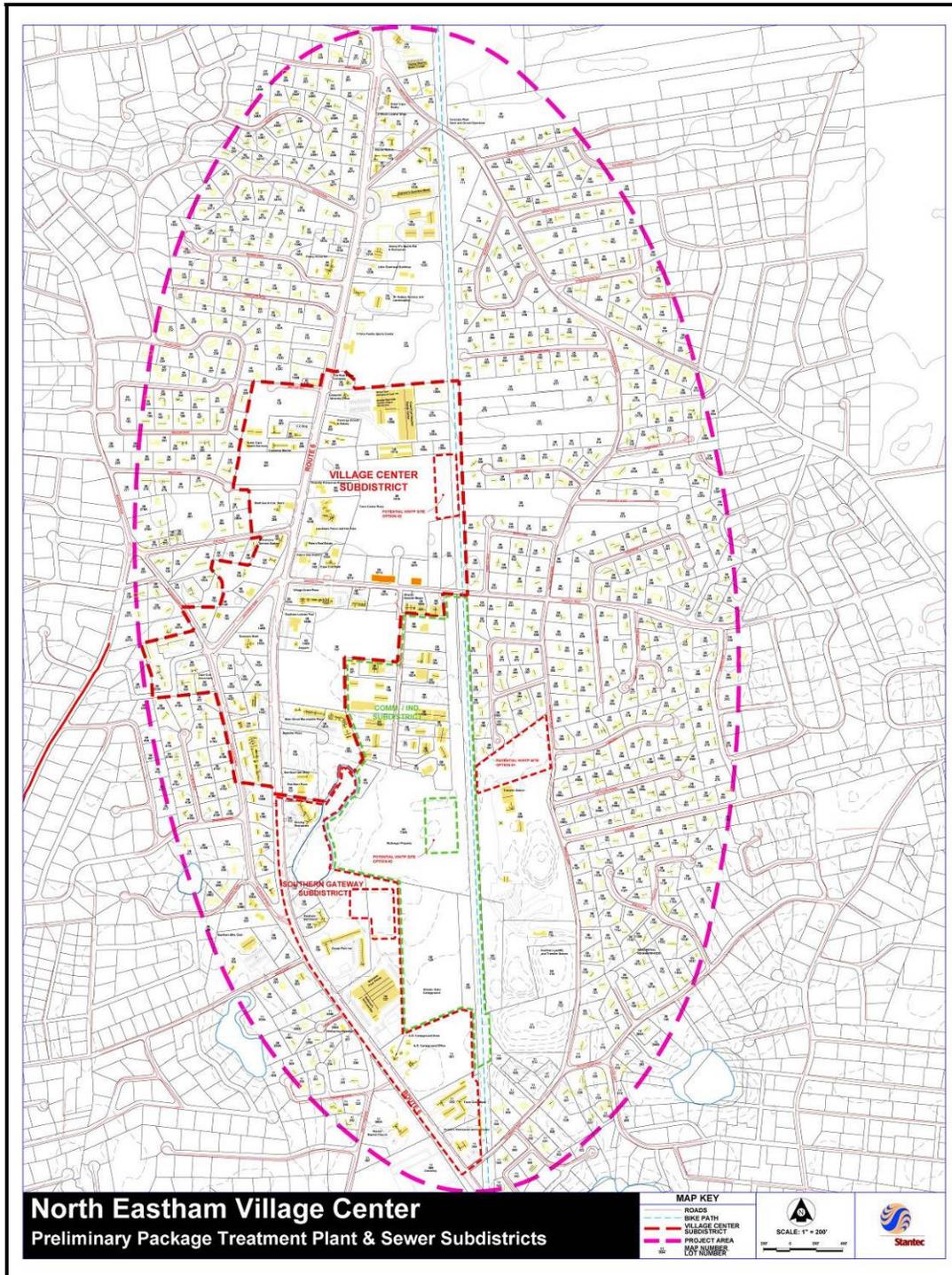
The table below summarizes the estimated sewage flow in gallons per day (gpd).

Estimate Sewage Flow (gpd) for NEVC Project Area			
Sub-area	Existing	Future	Totals
Commercial Industrial	3,800	55,600	59,400
Southern Gateway	50,000	4,600	54,600
Village Center Core	101,400	45,500	146,900
Totals	155,200	105,700	260,900

Two potential sites for wastewater treatment facilities are identified to treat the sewage produced by the proposed service area: one in the Village Center Core Area and the other in the Commercial Industrial Area (combined treatment with the Southern Gateway Area). Both facilities would be built in two phases.

The Village Center treatment plant would have an initial design capacity of 102,000 gpd and in phase two, the capacity would increase to 150,000 gpd. The required plant footprint including process structures, leaching area, and additional phase two expansion area equals 2.2 acres. The proposed location of the plant is on parcel 08/191E as shown on the preliminary sewer layout plan on the next page.

The Commercial/Industrial treatment plant would have a phase one design flow of 60,000 gpd and an increased capacity to 115,000 gpd in phase two. The plant footprint would be 40,000 sq.ft. with an additional 30,000 sq.ft. of available land required for phase two. The proposed plant location is in parcel 08/134A.



Electricity and Telecommunications Lines – There are extensive overhead electric and telecommunication lines throughout the NEVC Project Area. A major transmission line parallels the Cape Cod Bike Trail on the west side and is accessed by several parcels and easements held by utility companies. This line may pose an issue for access to the pathway from the Village Center as well as siting water and wastewater facilities.

Overhead lines are also located on the east and west side of Route 6 through the Project Area as well as on the south side of Brackett Road.

Burying existing overhead utilities lines is typically a lengthy and expensive process. An average cost for burying the lines in the Northeast may be \$20 per linear foot or higher. The other major issue to consider is reconnecting to existing buildings from ground level, which can require site and internal building work. Relocating power lines to more secluded areas, such as behind buildings, is another option but only where there is adequate space and access.

The overhead utility lines on Brackett Road provide the best opportunity for burying or relocating the lines behind the buildings on both sides of the road. If road work is to be completed in the next few years (as is suggested in Section 2.4 above) this may provide the best opportunity to accomplish this improvement. The overhead utility lines on Route 6 are a more difficult project. If the town is to pursue burying or relocating these lines, the project should focus on the Route 6 and Brackett Road intersection where it would have the most positive visual impact.

As an alternative to burying or relocating overhead utility lines, good landscaping can be an effective and less expensive means of accomplishing the same goal. The use of certain types of deciduous trees with canopies that grow up to the lines or can be shaped to hide the lines have been used in many areas around New England. However, coordination is necessary with the utility companies to ensure that pruning is done carefully to maintain the health of the tree and its screening application.

Other Utilities – There are no other public utilities in the NEVC Project Area. There is limited gas service or other piping in the Project Area. All stormwater from private properties and public roads is surface drainage flowing to detention basins, culverts, and ditches.

Utility Issues & Opportunities

- There is no public water or sewer service in the Project Area, which poses a challenge for village development patterns with higher density.
- Establishing a central water and sewer system may be a long-term project for the Village Center. The best opportunity to fund these systems would be through state and federal funding sources and by creating a special services district.
- Overhead power lines on Brackett Road Route 6 are unattractive. They should be relocated underground or behind buildings where feasible. All new development in the Village Center should be required to place all utilities underground.

2.6 Market Profile and Opportunities

In gaining an understanding of the North Eastham Village Center's market potential, the following economic characteristics were evaluated:

- General trade area socioeconomic indicators such as population, per capita and household income, business sector and employment trends, and potential sales
- Potential tax base growth
- Key land and building space for business development
- Potential infrastructure and environmental issues related to existing and future economic development

Various data sources were used to create a market profile and qualify the potential for (and constraints to) future economic growth in the Village Center. Existing and future trends as well as market opportunities to serve local residents and visitors are identified

in this section. All full evaluation of market area trends, conditions, and opportunities is included in Appendix D.

Trade Area Businesses, Employment, and Sales

A major indicator of market strength is current employment and sales patterns of selected industrial sectors in the primary trade area. For the purposes of this analysis, the North Eastham Village Center Trade Area has been evaluated to a radius of 5, 10, and 15 miles from the intersection of Route 6 and Brackett Road as described under Section 2.1 above. The Primary Trade Area for the NEVC was determined to be 5 miles from this intersection encompassing all of the Town of Eastham and a small portion of Orleans and Wellfleet.

NEVC Trade Area Summary of Existing Employers													
Measure from Rt. 6 & Brackett Rd Intersection		0.00 - 5.00 Miles				0.00 - 10.00 Miles				0.00 - 15.00 Miles			
SIC Code	Business Description	Total Establishment	Total Employees	Sales (in Millions)	Establishments 20+ Employees	Total Establishment	Total Employees	Sales (in Millions)	Establishments 20+ Employees	Total Establishment	Total Employees	Sales (in Millions)	Establishments 20+ Employees
		TOT	All Industries	948	7,733	751.0	61	2,336	20,360	1,895.9	165	5,037	40,839
MAN	All Manu. (SIC 20-39)	17	222	12.2	6	56	749	58.5	12	140	1,735	136.5	26
RET	All Retailing (SIC 52-59)	263	3,133	251.4	25	579	6,145	569.1	47	1,215	11,766	1,139.2	108
SER	All Services (SIC 70-79)	432	2,627	203	23	1,044	9,230	551	67	2,144	15,131	949	104
ADM	Public Admin. (SIC 90-97)	17	208	.0	3	69	769	.0	13	166	1,619	.0	26

Employment and Business Base – Within the **North Eastham Village Center Project Area**, there are an estimated 133 employers representing 81 specific industry classifications. Additionally, there are an estimated 800 employees in the NEVC and over \$137 million in gross sales volumes by these local businesses. The inventory displays a large variety of businesses with no dominance by particular sectors. However, restaurants and hotels are the most common types of businesses in the Project Area. (See Appendix D).

The **Primary Trade Area** for the NEVC includes a total of 948 businesses representing over 55 general industry codes. The number of employers expands significantly at 10 and 15 miles out from the PTA reinforcing the dominant presence of the larger communities on the lower Cape (such as Orleans, Chatham, Brewster, Dennis, and Yarmouth) as the major source of employment and services for Eastham residents.

Employment by industry sector in the PTA is consistent with regional trends. The service sector includes 432 employers, making up the largest number in the PTA (46%), followed by retailing (28%) and manufacturing and public administration (2%). In terms of employees, there are 3,133 retailing jobs in the PTA, representing the largest number (41 percent) of all jobs, followed by the service sector with 34 percent. Retailing also represents the highest sales volumes in the PTA with over \$251million.

Trade Area Competition – According to the results of the business inventory and socioeconomic analysis, the proposed NEVC’s primary **retail and service** competition at this time is the existing businesses in other nearby small villages such as Orleans, Chatham, Brewster, East Dennis, Wellfleet and Provincetown. These villages are historic and well established as mixed use districts. However, they are also far enough from the NEVC to provide significant competition in terms of business development but significant

draws based on cultural and historic attractions. There are a number of large retailers along Route 6 to the west. However, these highway-oriented commercial districts serve more as a convenient shopping area for the region and commuters than a destination district, as the Village Center is desired to be.

Anchors – Anchors are an important component of the Village Center. As with malls, larger stores and smaller specialty stores serve to draw a larger customer base. Often anchors will attract customers that are also potential customers for other stores and services causing linked trips and increasing the time spent in the Project Area.

There are a few public and private anchors in NEVC Project Area based on their size, customer draw, or unique niche in the regional market. Some existing anchors include the Post Office, Sheraton Four Points, Fairway Restaurant (and other year-round restaurants), Village Green General Store, and Seaman's Bank.

Existing and future anchors should be well positioned and dispersed throughout the Project Area. This creates an opportunity for customers to pass many of the smaller stores on their way between anchors. Well placed anchors can draw local residents as well as students, local employees, and visitors to spend more time and money in the Village Center. Potential pedestrian-oriented future retail and restaurant anchors could be well positioned on Village Center Core Area properties while auto-oriented retail and service anchors as well as future residential developments should be guided to the Route 6 corridor.

Business Clusters – Business clusters are similar types of businesses located in close proximity of each other. Clustering businesses that share customers or have complementary goods strengthens the customer's choices and the perception of downtown as a shopping destination. Identifying clusters can also guide the development of the Village Center Core Area by assisting new businesses in finding the optimal location for their stores. Future business clusters should be located on the Village Center Core Area.

Public Attractions – Beyond the general draw of natural and historic resources in Eastham (i.e., National Seashore, Cape Cod Bike Trail, historic sites), there are few public attractions in the Village Center. From a historic point of view, the NEVC Project Area does not provide a lot of attraction. More public attractions would strongly enhance the business environment in the Village Center Core Area. New indoor and outdoor gathering spaces should be flexible, attractive, and capable of being used for multiple purposes such as meetings, conferences, displays, and entertainment. These types of spaces are included in the concept plan for future development in Section 4.

Market Assessment and Opportunities

Existing and potential new businesses need information about area competition. To advocate for the North Eastham Village Center Project Area as an excellent business location and differentiate it from other choices, an assessment has been made of the competing commercial districts in the trade area.

While the NEVC Project Area may not be able capture all of the retail and service sales dollars that are currently going out of the primary trade area (referred to as sales leakage), with better services for local residents, connections to the regional resident and visitor populations, streetscape enhancements, strategic redevelopment and development, enhanced public amenities and aggressive recruitment of desired locally-oriented businesses, a percentage of recapture is achievable.

To be conservative, a 3-to-5-percent market recapture in the next five years would be a reasonable goal for NEVC. This figure could be well exceeded based on the progress of the development and redevelopment in the Village Center. Based on the analysis of current market conditions and potential market demand, the best opportunities for business development in the NEVC Project Area are identified below. (More detailed consumer spending information is contained in Appendix D.)

Existing and Potential Consumer Spending – The table below summarizes the estimated existing and potential future consumer spending for the NEVC Primary Trade Area by industry sector and household income. (See Appendix D-8 for more detailed information.) Total **consumer spending** (all categories) in the primary trade area for 2006 was estimated to be \$221,151,000. To break this down further, estimated annual **per capita spending** is about \$22,122, and average **annual household spending** is about \$47,033. This figure is calculated by comparing the number of households and their income levels with the Consumer Expenditure Survey (CES) for the Northeast United States.⁴

Potential Trade Area Spending Index

- Below 70 – Low Potential
- Between 71-80 – Moderate Potential
- Above 90 – High Potential

The overall **Market Index** (potential consumer spending) for the primary trade area is slightly below the national average (98). That is, Eastham PTA consumers spend about 2 percent more than the average. This is typical of the trend in lower consumer expenditures for rural areas in the Northeast United States

(U.S. Department of Labor). However, for the purposes of this analysis, a market index figure greater than 90 is rated high for potential spending in selected consumer good categories.

Socio-Economic Profile of NEVC Trade Area, 2006-2011

From Rt. 6 & Brackett Rd Intersection

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	2006	2011	2006	2011	2006	2011
Demographic Totals						
Population	9,997	10,207	25,406	25,923	60,743	61,704
Households	4,702	4,858	11,548	11,916	27,864	28,591
Families	2,894	2,989	7,380	7,615	17,623	18,066
Group Quarters Population	137	139	604	620	1,571	1,618
Housing Units	10,300	10,657	23,461	24,196	52,142	53,561
Average Household Size	2.10	2.07	2.15	2.12	2.12	2.10
Median Age	50.91	53.36	50.71	53.22	51.02	53.36
Median Household Income	\$46,569	\$50,749	\$51,282	\$56,457	\$51,158	\$56,198
Median All Owner-Occupied Housing Value	\$413,811	\$519,947	\$433,015	\$554,027	\$415,902	\$528,124
Est. Average Effective Buying Income	\$49,708	\$54,866	\$52,091	\$57,330	\$50,975	\$56,295
Est. Median Effective Buying Income	\$37,766	\$40,966	\$41,311	\$44,680	\$41,170	\$44,537

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Based on the findings of the market index, business inventory, and market profile, an opportunity exists for the enhancement or expansion of certain types of businesses in the NEVC Project Area. There are several categories of consumer products and services that Eastham PTA residents spend more than both the national and regional average on. Those that also indicate a growth trend over the next five years are considered very high potential for expansion in the NEVC Project Area. A list of these

⁴ The Consumer Expenditure Survey (CES) is issued by region each year by the U.S. Department of Labor.

services and their potential for expansion are summarized in the table below and identified in detail in Appendix D.

North Eastham Village Center Primary Trade Area Consumer Spending, 2006 and 2011								
Measure from Rt. 6 & Brackett Rd Intersection Annual Expenditures	0.00 - 5.00 Miles							
	Aggregate (in 000's)		Per Capita		Average Household		Market Index to USA	
	2006	2011	2006	2011	2006	2011	2006	2011
Apparel	17,201	20,016	1,721	1,961	3,658	4,120	83	82
Entertainment	25,251	31,671	2,526	3,102	5,370	6,520	520	519
Food at Home	26,622	29,671	2,663	2,907	5,662	6,108	97	96
Health Care	20,337	29,299	2,034	2,870	4,325	6,031	111	111
Medical Services	8,457	10,454	846	1,024	1,799	2,152	108	107
Prescription Drugs	11,192	17,993	1,120	1,763	2,380	3,704	114	114
Medical Supplies	688	851	69	83	146	175	107	106
Household Textiles	2,693	3,361	269	329	573	692	101	99
Furniture	3,609	4,425	361	434	768	911	98	97
Major Appliances	1,602	1,809	160	177	341	372	103	103
Small Appliance/Houseware	3,078	3,642	308	357	655	750	100	99
Miscellaneous Household Equipment	2,481	3,127	248	306	528	644	101	101
Miscellaneous Personal Items	16,781	20,697	1,679	2,028	3,569	4,260	309	308
Education	4,939	6,557	494	642	1,050	1,350	81	79
Pet Expenses	2,195	2,748	220	269	467	566	99	98
Day Care	1,138	1,275	114	125	242	262	77	73
Contributions (All)	8,882	10,204	888	1,000	1,889	2,100	106	106
Housekeeping Supplies	1,662	2,069	166	203	354	426	97	96
Food Away from Home	21,279	25,182	2,128	2,467	4,525	5,184	93	92
Alcoholic Beverages	6,266	7,276	627	713	1,333	1,498	107	107
Household Services	2,401	3,009	240	295	511	619	96	95
Household Repairs	6,158	6,943	616	680	1,310	1,429	111	111
Housing Expenses (Fuels, Utilities, Phone Service)	6,403	6,939	640	680	1,362	1,428	109	102
Transportation Expenses	32,410	40,131	3,242	3,932	6,893	8,261	94	94
Automotive Maintenance/Repair/Other	7,762	10,314	776	1,010	1,651	2,123	100	100
Total Specified Consumer Expenditures	221,151	270,363	22,122	26,488	47,033	55,653	98	97

The Annual Aggregate (in 000's) is used to obtain the Annual Per Capita and the Average Household data by dividing the aggregate by the corresponding total household population and total households, respectively. The Market Index value is the ratio of the Annual Average Household Expenditure (AAHE) for the geography that this report is being produced, as compared to the "AAHE" for the U.S.A. Current Year Estimates and Five Year Projections are produced by Claritas, Inc.

In 2011, the total consumer spending in the primary trade area is projected to grow to \$270,363,000 or an increase of about 22 percent. Particular goods and services that primary trade area households are expected to spend more than the Northeast regional average are identified in the table below.

For example, under the category of "Medical Services", the NEVC Primary Trade Area (PTA) is estimated to 108 percent of the Northeast regional average in 2006 and projected to spend 107 percent in 2011. Under this same category, actual dollar expenditures are projected to increase by 23.6% in the PTA between 2006 and 2011, even though the percentage of expenditure relative to the region declines slightly.

NEVC PTA High Potential Consumer Spending Projections, 2006 -2011			
Measure from Rt. 6 & Brackett Rd Intersection			
Annual Expenditures	0.00 - 5.00 Miles PTA Market Index vs. NE US		Projected Grow in Spending 2006-11
	2006	2011	
Entertainment:			
Reading Materials	129	128	5.4%
Travel	105	104	25.5%
Total Food at Home			
Bakery Products	104	103	9.4%
Dairy Products	103	102	7.6%
Sugar and Other Sweets	102	102	12.0%
Total Health Care			
Medical Services	108	107	23.6%
Prescription Drugs	114	114	60.8%
Medical Supplies	107	106	23.7%
Total Household Textiles			
Window and Furniture Covers	103	101	23.0%
Total Furniture			
Major Appliances	103	103	12.9%
Small Appliance/Houseware	100	99	18.3%
Misc. Household Equipment	101	101	26.0%
Misc. Personal Items:			
Personal Expenses and Services	113	111	26.5%
Smoking Prods/Supplies	102	103	14.3%
Contributions (All)	106	106	14.9%
Total Food away from Home			
Food and Nonalcoholic Bev. on Trips	100	100	8.5%
Total Alcoholic Beverages			
Alcoholic Beverages at Home	105	104	15.1%
Alcoholic Beverages away from Home	113	112	18.2%
Shelter and Related Expenses:			
Household Repairs	111	111	12.7%
Fuels and Utilities	232	218	-14.9%
Transportation Expenses:			
Boats and Outboard Motor, Etc	105	105	13.9%
Rented Vehicles	120	116	18.4%
Automotive Maintenance/Repair/Other	100	100	32.9%

A particular increase appears to be projected for health care services, supplies, and prescription drugs. This is consistent with the demographic trends showing a higher than average median age of local residents which is expected to increase over the next five years. However, as the table below indicated, there is relatively few health care service providers in the Eastham Primary Trade Area compared to the larger region. These trends present an opportunity for growth in this service sector.

Other very high potential categories include reading materials, taverns (alcoholic beverages away from home), household repairs, fuel and utilities, and rented vehicles.

Heath Care Services Summary in the Eastham Trade Area, 2005													
Measure from 50 Brackett Rd at 5, 10 & 15 Miles		0.00 - 5.00 Miles				0.00 - 10.00 Miles				0.00 - 15.00 Miles			
SIC Code	Business Description	Total Establishment	Total Employees	Sales (in Millions)	Establishments 20+ Employees	Total Establishment	Total Employees	Sales (in Millions)	Establishments 20+ Employees	Total Establishment	Total Employees	Sales (in Millions)	Establishments 20+ Employees
80	Health Services	22	99	9.8		92	912	61.8	6	198	2,627	182.8	18
801	Office of Doctors of Medicine	11	46	5.7		64	211	26.1		126	384	46.4	
802	Office of Dentists	7	32	2.3		22	107	7.6		47	220	15.6	
803	Office of Osteopathic Physicians			.0		5	25	1.7		5	25	1.7	
804	Office of Other Health Practioners	5	11	.8		14	41	2.8		32	121	8.1	
8041	Chiropractors Offices and Clinics	3	8	.6		7	17	1.2		16	51	3.4	
8042	Optometrists Offices and Clinics	1	3	.2		4	12	.8		8	24	1.6	
8043	Podiatrists Offices and Clinics			.0		2	12	.8		6	46	3.1	
8049	Other Health Practioners Not Classified	1		.0		1		.0		2		.0	
805	Nursing and Personal Care Facilities			.0		4	450	17.1	4	17	1,230	47.0	13
806	Hospitals			.0		1	30	2.4	1	4	492	50.2	3
807	Medical and Dental Laboratories			.0		3	27	2.0	1	12	65	5.0	1
808	Home Health Care Services			.0				.0		3	40	3.8	1
8093	Specialty Outpatient Facilities			.0		1	1	.1		2	3	.3	

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Current Retail Sales Leakage –An evaluation of consumer retail spending patterns to the trade area sales records (see Appendix D-11) indicates that nearly \$168 million are spent by NEVC Primary Trade Area consumers yet trade area business sold nearly \$188 million in goods and services. In eating and drinking establishments alone, local consumers spent about \$15 million while local businesses took in over \$54 million. This trend indicates an overall surplus of retail good and service providers which can be explained by the expansion of the local market due to the very large tourist and travel trade.

While there is a overall surplus in the local supply compared to the demand, there are several specific categories of retail goods and services that still have strong potential for expansion in the primary trade area, and specifically, in the Village Center. The term “sales leakage” refers to the amount of consumer retail and service sales not spent in the primary trade area but in other areas. The table below indicated that in these selected categories there is a sales leakage out of the primary trade area of about \$86 million. This means that approximately 47 percent of existing sales in these categories are leaking out of the PTA to competing shopping areas in the region.

A list of the types of retail businesses, which may enhance their revenues through expansion or merchandise line reorientation, and the types of businesses, which may be recruited to the Village Center, is presented in the table below. Retail sectors that appear to have the best potential in the Village Center (based on the gap between demand and current PTA sales) are the following:

- Radio, Television, Electronics Stores
- Home Centers
- Pharmacies and Drug Stores
- Department Stores

-
- Warehouse Clubs and Super Stores
 - Electronic Shopping, Mail-Order Houses
 - All Other General Merchandise Stores
 - Direct Selling Establishments

Gap Analysis – Based on the difference between existing consumer expenditures (demand) and the current sales in the PTA (supply) it has been projected that an additional \$86 million in retail sales could be supported in the primary trade area, and this estimate is projected to grow over the next five years. Based on the individual business categories where this gap exists, an additional 228,284 square feet of commercial retail development can be supported in the primary trade area.

According to the existing conditions evaluation, the NEVC could physically support a range of commercial expansion between 50,000 and 200,000 square feet through a combination of new development, rehabilitation, conversion, and expansion of existing buildings. A conservative goal, based on the market potential and physical capability of the land would be to achieve 20,000 square feet of additional commercial space by the year 2011. (See Appendix D from detailed estimates and projections on consumer expenditures and median square footages for community and neighborhood centers by business types).

Village Center Niches – The market profile confirms that the North Eastham Village Center Project Area has a strong niche for selected retail goods, health services, and personal services. These conclusions are drawn from the business and property inventory, market index, and trade area comparisons.

In order to build on these niches, the town and local business community need to work in partnership on every aspect of the development plan. In terms of building on non-retail business niches, efforts should be made to facilitate upper floor and side street renovations and occupancy. To build on existing retail niches, efforts should be made to promote the NEVC Project Area for high-quality expansion targeting existing geographic clusters. There are particular niche opportunities in high-quality apparel, restaurants, home furnishings, and entertainment.

In all cases, existing and new development in Village Center Core Area must place a high emphasis on variety, quality, customer service, and dependability. Each business must understand and serve its own unique customer niche while working cooperatively with others in the NEVC Project Area to expand the overall market.