

DOWNTOWN HYANNIS ACTION STRATEGY

MassDevelopment and the
Town of Barnstable, MA

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PREPARED BY:



www.camoinassociates.com

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1. EXECUTIVE SUMMARY

DOWNTOWN HYANNIS IS UNIQUE

Downtown Hyannis has long been a vibrant seasonal tourist destination, but it also functions as the urban center for Cape Cod. The neighborhood is home to a number of strong cultural institutions, social service providers, critical transportation hubs, and government entities. Efforts have been underway over the past decade to leverage the existing assets to build a resilient year-round economy by increasing the density and availability of housing, while simultaneously developing mechanisms to create and retain living-wage job opportunities. COVID-19 has illuminated the vulnerabilities associated with the seasonal nature of the economy and initiated a paradigm shift in how people live and work. This has created a renewed sense of urgency for the community to unify under a common vision and place itself in a position to channel future public and private investments thoughtfully and strategically.

What is the Downtown Hyannis Action Strategy?

Downtown Hyannis is rich in passionate people and highly capable organizations that have been implementing a myriad of projects and initiatives to support small businesses, arts and culture, and early stage housing developments.

The purpose of the Downtown Hyannis Action Strategy is to coalesce these ongoing efforts and catalyze that momentum within a focused, actionable strategy for downtown that will function as an implementation roadmap for Hyannis to cement itself as a resilient year-round community in the heart of Cape Cod. The document includes many relevant recommendations from previous planning studies of the neighborhood, as well as new strategies that derived from a fresh community engagement effort.

How will it be used?

The Downtown Hyannis Action Strategy combines a vision for the future of downtown Hyannis and a detailed, actionable plan for attaining that vision. As the downtown evolves and related conditions and economic drivers shift, the vision for downtown may also evolve, resulting in future modifications to this plan. The Action Plan Matrix provided at the end of this report includes a prioritized list of actions and strategies needed to successfully implement the Downtown Hyannis Action Strategy. The Action Plan Matrix will be referred to and refined frequently as projects and initiatives are implemented and new actions emerge.

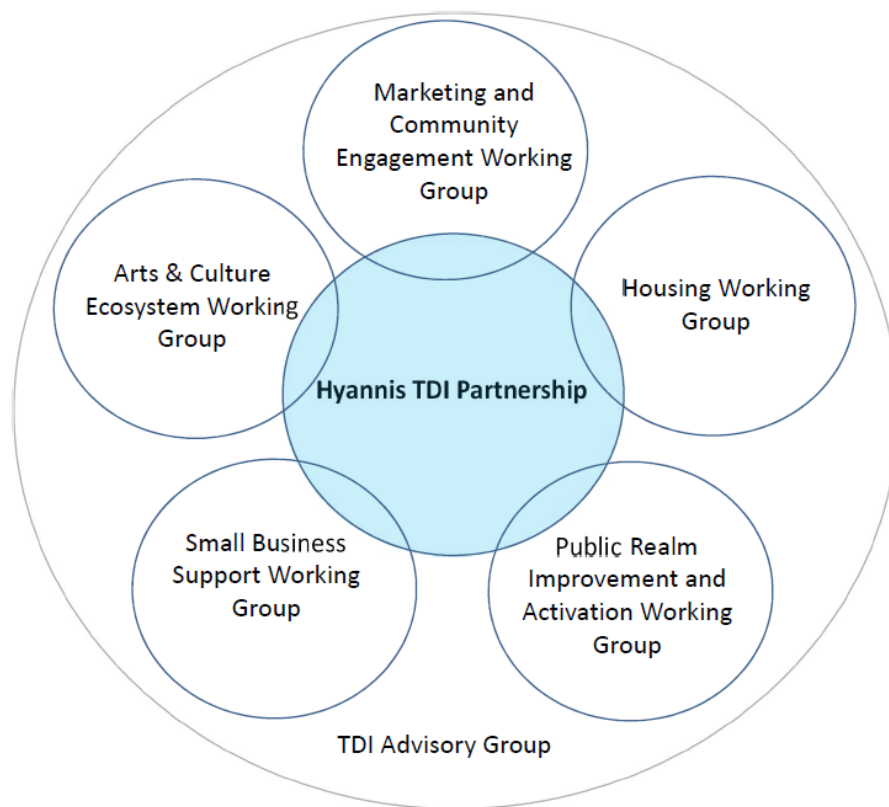
Throughout this strategic planning process, the Town of Barnstable, MassDevelopment, and Camoin Associates engaged several key stakeholders to gain a better understanding of how local and regional partners can work together to support successful projects and initiatives. The Town of Barnstable and MassDevelopment are far from alone when working to enhance Downtown Hyannis and therefore this Action Plan Matrix includes several stakeholders as partners in furthering action strategies. Key partners identified in the Action Plan Matrix include:

- Hyannis TDI Partnership including its targeted working groups in Housing, Public Space Activation, Small Business Support, Arts & Culture, and Marketing and Community Engagement
- Town of Barnstable Planning & Economic Development Department with specific efforts targeted for its Economic Development Program and Economic Development and Housing & Community Development Departments
- Hyannis Business Improvement District (BID)
- Department of Transportation (DOT)

- Cape Cod Regional Transit Authority (CCRTA)
- Cape Cod Commission
- Cape Cod Blue Economy Foundation
- Affordable Housing Growth Development Trust Fund Board
- Cape Cod Chamber
- The Cordial Eye
- Love, Live, Local
- Arts Foundation of Cape Cod
- Housing Assistance Corporation of Cape Cod
- CapeBuilt
- The Design Eye

Partners interviewed as part of this project will also be crucial to implementing strategies including Love, Live, Local, The Cordial Eye, Soho Arts Co, EForAll, Hyannis Civic Association, The Design Eye, Hyline, Open Cape, Amplify POC, Hyannis Marina. Other partners that will be crucial to implementing these strategies include school departments, water and sewer departments, local and regional realtors, developers, local banks, educational institutions, and downtown businesses. It is important to note that this list is not a comprehensive list of all organizations, groups, and individuals within the Hyannis doing great work to enhance the downtown environment.

Figure 1. Diagram of the Existing Cross-Sector Partnership Structure Under the Transformative Development Initiative

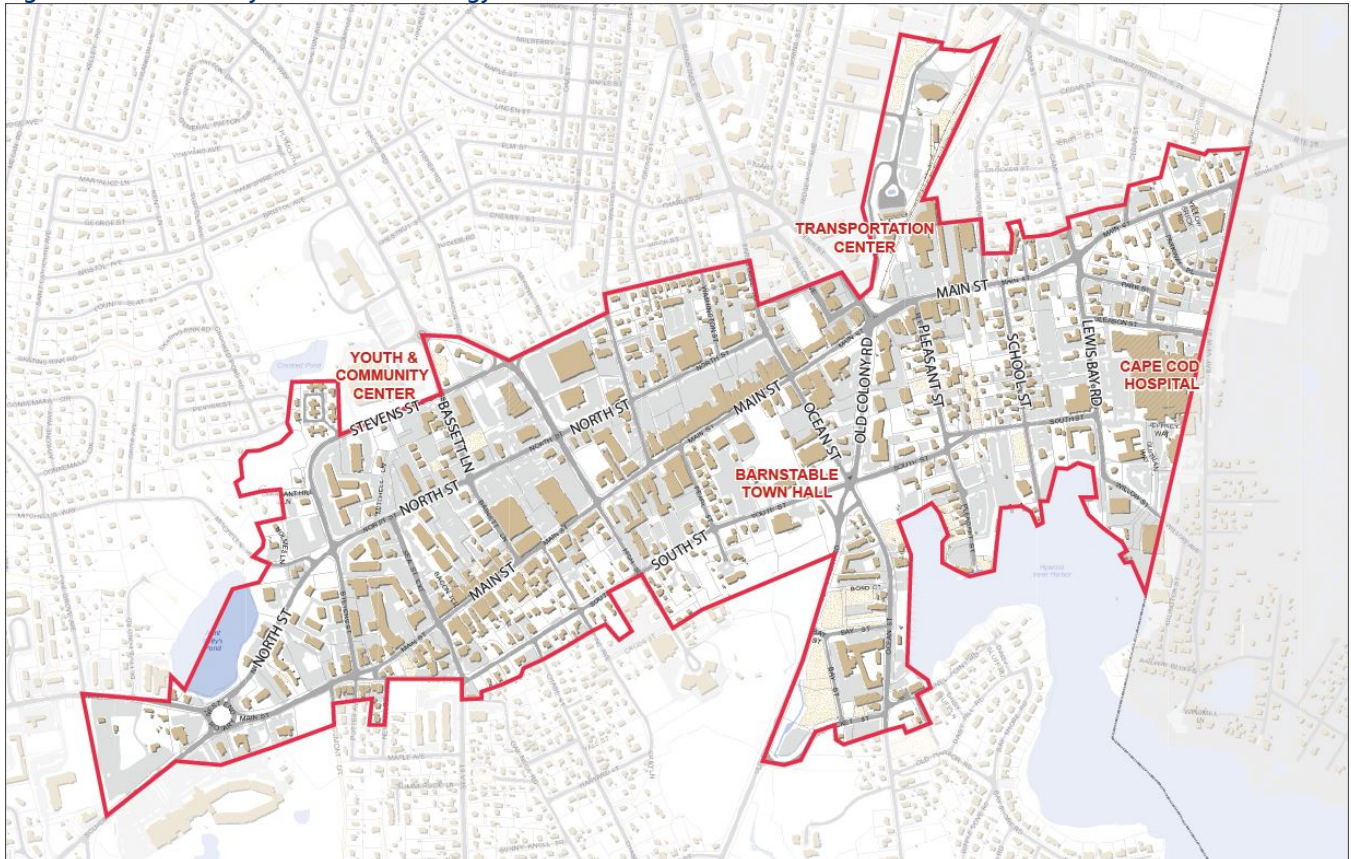


Source: MassDevelopment

PLAN AREA

The focus area for the Downtown Hyannis Action Strategy is delineated in the image below. As shown, the study area spans from the Melody Parcel (just west of the traffic circle) to the eastern Town line and includes properties along South Street, Main Street, North Street, and Stevens Street.

Figure 2. Downtown Hyannis Action Strategy Area



PLANNING PROCESS

The Downtown Hyannis Action Strategy was created through a planning process that included community engagement guided by the Town of Barnstable, MassDevelopment, and Camoin Associates. The process included the following elements:

Existing Conditions

- **Review Background Materials** – Background reports, studies, and surveys were reviewed as part of the strategic planning process to understand past and ongoing economic development projects and initiatives in Downtown Hyannis. Key materials included the Utile Downtown Hyannis Public Spaces Activation Report 2021, Gateway Hyannis 2010, Downtown Hyannis GIZ Application 2018, CCRTA Final Report 2020, Downtown Hyannis Zoning Districts, Nelson Nygaard Hyannis Parking Study 2017, Nelson Nygaard Downtown Hyannis Implementation Plan 2019, Cape Cod Commission Community Resiliency by Design Project 2019, Cape Cod Chamber of Commerce Town of Barnstable Strategic Recommendations 2019, and SSA Freight Survey 1997.
- **Current Conditions** – Socioeconomic, economic, and market trends were examined for Hyannis, the Town of Barnstable, and Barnstable County to understand the trends impacting downtown development. These trends serve as the foundation for identifying economic development projects and initiatives for Downtown Hyannis.
- **Economic Drivers** – Using the information collected in the initial review of past reports, interviews, and public open house, Camoin Associates populated a list of opportunities and deterrents to growth.

Engagement

- **Interviews** – Camoin Associates conducted over 20 interviews to gain a better understanding of the market and economic trends locally and regionally as well as understand key opportunities and challenges that would impact the Town and its partners to carry out economic development projects and initiatives. For a list of interviewees, view Attachment A: Stakeholder Interviews.
- **Public Open House** – A public open house was held on May 26, 2021, to tap into the community's creativity and get input from residents, businesses, and visitors on a vision for Downtown Hyannis. During the open house, the 11 participants were asked to develop downtown projects that would act as a transformative catalyst for downtown. Participants designed projects and initiatives to achieve that vision.
- **Survey** – Camoin, the Town of Barnstable, and MassDevelopment created a survey to obtain the community's input on economic development challenges, opportunities, and potential projects for the future of Downtown Hyannis. The survey was distributed digitally via email by the Town of Barnstable and MassDevelopment during May 2021. A total of 354 responses were collected and analyzed as part of the Downtown Hyannis Action Strategy Survey from May 10, 2021, to May 21, 2021. Of those respondents, 225 completed the survey in its entirety. Survey results can be viewed in Attachment B: Survey Results.
- **TDI Partners Workshop** – On October 14, 2021, Camoin Associates facilitated a workshop with MassDevelopment, the Town of Barnstable, and the TDI Partnership to review the draft strategy, work through the Action Plan Matrix, and solidify goals and strategies. This work helped us to align roles and responsibilities, timeframes, metrics, and resources.
- **Town Staff Engagement** – The Town of Barnstable has been engaged throughout the entire strategic planning process by providing input and insight on project engagement, project process, and reviewing project deliverables.

Vision – Narrative & Illustrative

Based on the assessment of prior reports and ongoing projects, stakeholder input, and discussions with the Town of Barnstable and MassDevelopment, Camoin Associates outlined a community vision focused on creating a vibrant downtown. Working as a team, Camoin Associates guided the Town of Barnstable and MassDevelopment through a visioning exercise to review the projects and initiatives completed in Downtown Hyannis, underway and proposed to develop goals and vision for the future of Downtown Hyannis. The vision for Downtown Hyannis is detailed further in Chapter 4. Downtown Hyannis: Forward Together.

Action Plan

The Action Plan Matrix is the community's tool for implementation. Each strategy is fleshed out with proposed actions, partners, timeframe, resources (including tools, datasets, etc.), and outcome metrics to track progress over time. Through stakeholder engagement and the TDI workshop, stakeholders confirmed their roles, responsibilities, and priorities for implementation.

PRIORITY STRATEGIES & ACTIONS

Priority projects are forward-looking and anticipate the future needs of the main street economy. The priority projects designed to move the Downtown Hyannis economy forward are identified on the following pages.

Priority Strategy: Advance redevelopment and development downtown for priority sites.

This initiative is about taking a proactive approach to catalyzing development by focusing public-sector investment on a few high priority properties that can re-shape Downtown Hyannis and help spur additional growth.

Key Actions

- Use 200 Main Street's redevelopment as a pilot for how the town can advance projects
 - Establish a program to redevelop vacant or underutilized parcels
 - Develop concept plans for underutilized sites that serve as potential transformative projects
-

Priority Strategy: Expand and create downtown places that support the arts.

A key element of this strategy is to strengthen the connections between place-based arts and culture and economic development initiatives through collaboration and partnerships with existing downtown businesses.

Key Actions

- Encourage and support HyArts campus expansion to allow for increased capacity in arts and culture
- Evaluate and encourage artist housing to support vibrant arts and culture downtown
- Continue to invest in spaces for performing arts including ocean front band stand
- Create incentives for the development of an arts and culture incubator and/or artist coworking space
- Create a task force that focuses on the development of the proposed new performing arts center to accommodate a wide array of events.

Priority Strategy: Create a downtown environment rich in human experience.

This initiative is about helping Hyannis become a year-round place that residents and visitors alike want to be and interact with through many experiences by enhancing the public realm downtown.

Key Actions

- As new housing comes online and residents move in, track demand for goods, services, and amenities by this new resident population (i.e. grocery store, child care, laundromat)
 - Convene stakeholders to continue to implement public space activation strategies as identified in UTILE Downtown Hyannis Public Spaces Activation 2021 report
 - Secure funding to implement wayfinding improvements
 - Secure funding to implement street scape and public realm improvements
 - Continue to expand events and programming downtown to engage residents and attract visitors
-

Priority Strategy: Create transportation gateways and parking that promote highest and best use of parcels.

Downtown Hyannis is to become the hub of a regional multi-modal transportation system by improving internal and external transportation connections and corridors.

Key Actions

- Support the development of a transportation gateway area surrounding the transit authority including mixed use development, high quality green space, etc.
 - Work with a planning and engineering firm to explore different multi-modal roadway scenarios for Main Street, including the potential for reconfiguring the one way street to two way traffic.
 - Create clear pathways from transportation hubs to downtown to limit car dependence downtown
 - Reconstruct/expand sidewalks and bike lanes to increase pedestrian and bicyclist usability and safety
 - Work with owners of large parking lots to explore infill development opportunities. Ensure highest and best use of developable parcels and address parking in economic nodes by supporting property owners of underutilized parking lots to make improvements to enhance visibility and usability.
 - Work with an engineering firm to understand the appropriate build out and feasibility of a parking garage
 - Facilitate the development of a parking garage in a centralized location by working with property owners of strategic locations, sourcing funding opportunities, and assisting in the marketing of the project to developers
-

Priority Strategy: Support the creation of space for entrepreneurs and innovators to create, connect, and collaborate including coffee shops, coworking, business support services, incubator/accelerator programming

By solidifying the culture and distinct resources for entrepreneurs downtown, this initiative aims to help take individuals with an entrepreneurial mindset and support them in their venture to create and grow a business in Hyannis.

Key Actions

- Facilitate the development of a downtown coworking space and assist in marketing the space to professionals in the region. This includes exploring grant opportunities, incentives, and financial packages.
- Support the creation of a commercial kitchen/culinary incubator by partnering with local institutions that provide culinary arts education. This includes exploring grant opportunities, incentives, and financial packages.

2. CURRENT CONDITIONS

Brief socioeconomic and economic trends within Hyannis, the Town of Barnstable, and Barnstable County were examined to understand the trends impacting downtown development to better identify economic development possibilities for Downtown Hyannis.

SOCIOECONOMIC

The Village of Hyannis is located on Cape Cod within the Town of Barnstable, Massachusetts. Hyannis is regarded as the hub of Cape Cod with its commercial space, restaurants, and social services. As of 2020 Esri data, the Village of Hyannis is home to approximately 14,498 people across 6,231 households. Between 2010 and 2020, population and household growth in Hyannis aligned with growth in the Town of Barnstable but fell short of growth in Cape Cod (Barnstable County). Looking forward to 2025, population growth is expected to slow across the three geographies. Household growth is expected to remain similar for Hyannis and decline in the town and county.

In terms of age, Hyannis' population is younger than the surrounding town and county with a median age of 42.9 compared to 50.4 in the town, and 53.4 across Cape Cod. Cape Cod's aging population is attributed to an out migration of younger people and an in migration of older people. Looking forward, the median age in Hyannis is anticipated to increase slightly to 43.6 years by 2025 while the median age in Cape Cod is expected to increase to 55.0.

Looking at the population by generations show that Hyannis' predominant generations are millennials (25.2%) and baby boomers (24.0%). Compared to the Town of Barnstable and Cape Cod, Hyannis has more millennials and less baby boomers. Hyannis also leads in composition of younger residents born after 1999 (generation Alpha and generation Z) whereas Cape Cod leads in the older demographics born before 1946 (baby boomers and silent & greatest).

Population, 2010 - 2025					
	2010	2020	2025	Annual Growth Rate 2010 - 2020	Annual Growth Rate 2020 - 2025
Hyannis (02601)	14,077	14,498	14,648	0.3%	0.2%
Town of Barnstable, MA	45,193	46,729	46,910	0.3%	0.1%
Barnstable County, MA	215,888	225,934	227,031	0.5%	0.1%

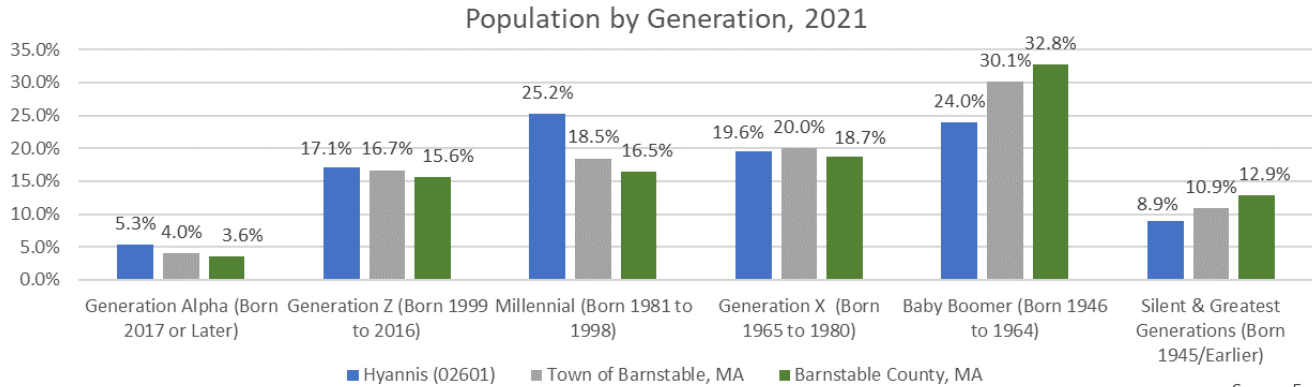
Source: Esri

Households, 2010 - 2025					
	2010	2020	2025	Annual Growth Rate 2010 - 2020	Annual Growth Rate 2020 - 2025
Hyannis (02601)	6,124	6,231	6,298	0.2%	0.2%
Town of Barnstable, MA	19,225	19,692	19,731	0.2%	0.0%
Barnstable County, MA	95,755	99,505	99,772	0.4%	0.1%

Source: Esri

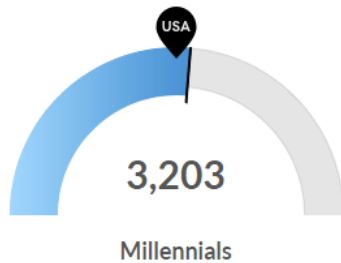
Median Age, 2010 - 2025					
	2010	2020	2025	Annual Growth Rate 2010 - 2020	Annual Growth Rate 2020 - 2025
Hyannis (02601)	41.8	42.9	43.6	0.3%	0.3%
Town of Barnstable, MA	47.3	50.4	50.9	0.7%	0.2%
Barnstable County, MA	49.9	53.4	55.0	0.7%	0.6%

Source: Esri

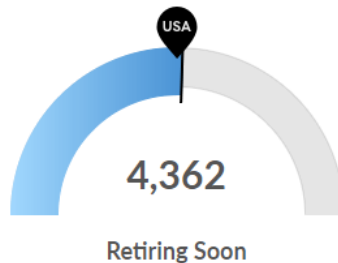


Hyannis' younger median age corresponds with a higher proportion of millennials and a lower proportion of retirees than Cape Cod. When compared to the national average, Hyannis has slightly more millennials and slightly more people near retirement age. On the other hand, Cape Cod has very few millennials and its population far exceeds the average proportion of people at retirement age in a community. Racial diversity is low in both Hyannis and Cape Cod when compared to the U.S. as a whole; however, Hyannis does have more diversity when compared to Cape Cod.

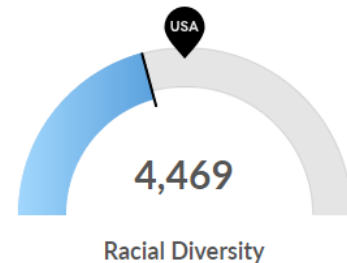
Hyannis Population Characteristics, 2021



Hyannis, MA (in Barnstable county) (ZIP 02601) has 3,203 millennials (ages 25-39). The national average for an area this size is 2,970.

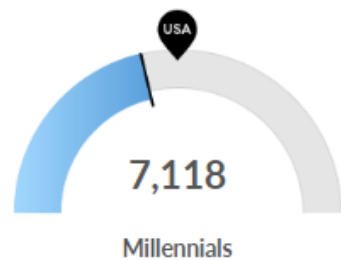


Retirement risk is about average in Hyannis, MA (in Barnstable county) (ZIP 02601). The national average for an area this size is 4,235 people 55 or older, while there are 4,362 here.

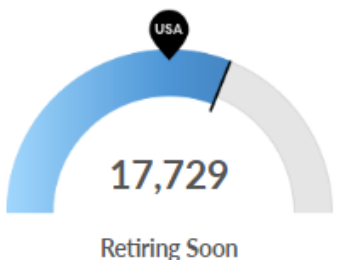


Racial diversity is low in Hyannis, MA (in Barnstable county) (ZIP 02601). The national average for an area this size is 5,745 racially diverse people, while there are 4,469 here.

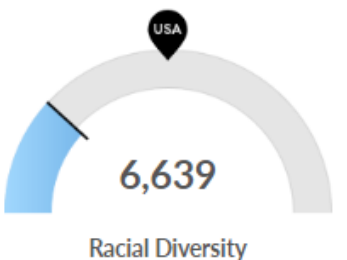
Cape Cod Population Characteristics, 2021



Your area has 7,118 millennials (ages 25-39). The national average for an area this size is 8,847.



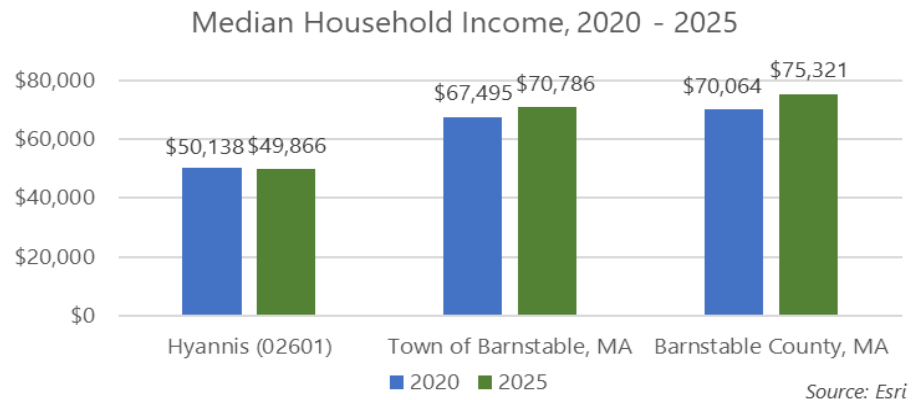
Retirement risk is high in your area. The national average for an area this size is 12,616 people 55 or older, while there are 17,729 here.



Racial diversity is low in your area. The national average for an area this size is 17,116 racially diverse people, while there are 6,639 here.

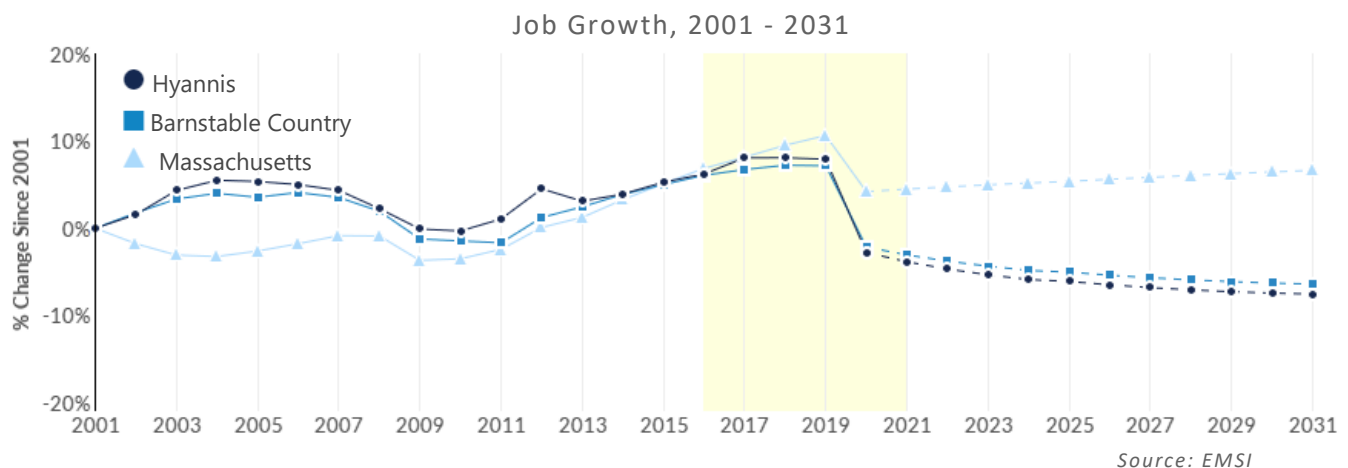
Source: EMSI

As of 2020, the median household income in Hyannis was \$50,138, ranking lower than incomes in the town and county. While incomes are anticipated to rise in the town and county into 2025, Hyannis is expected to experience a minimal decline. This wealth gap between Hyannis and Cape Cod shapes many of the economic development perspectives and ideas which are prevalent in the stakeholder interviews and survey responses. It is important to note that these income figures do not factor in second homeowner incomes that visit the region but do not consider their residence in Cape Cod as their primary residence.



ECONOMY

Historically, job growth trends in Hyannis have generally aligned with the Barnstable County. Prior to 2012, job growth in Massachusetts was largely negative and lagged growth in the Cape Cod region. The COVID-19 pandemic led to sharp job declines in 2020 across all geographies with Hyannis and Barnstable County anticipated to experience job declines. Massachusetts is projected to gradually gain jobs following the pandemic. Over the next five years from 2021 to 2026, Hyannis experience a decline of 2.7% compared to a decline of 2.4% in the county and a growth of 1.1% across the state.



The table below displays total jobs by industry sector for Hyannis from 2006 to 2021. From 2006 to 2021, the number of jobs in Hyannis declined by 917 jobs, a decline of 4%. Since 2006, job decline in Hyannis has been led by large job losses in Retail Trade and Information which can be attributed to COVID-19 and the closure of TD Bank. The largest industry in Hyannis by the number of jobs is Health Care and Social Assistance with over 7,000 jobs or approximately 31% of the total jobs. Health Care and Social Assistance is anticipated to continue growing as the hospital looks to expand. Other large industries include Retail Trade and Accommodation and Food Services.

Location quotient (LQ) ¹ indicates that Hyannis' Retail Trade, Health Care and Social Assistance, and Accommodation and Food Services industries are highly concentrated with LQs above 1.00, showing these industries are more prominent in Hyannis than the national average.

2-Digit NAICS Industries in Hyannis (02601), 2006 - 2021							
NAICS	Description	2006 Jobs	2021 Jobs	2006 - 2021 Change	2006 - 2021 % Change	Avg. Earnings Per Job	2021 Location Quotient
11	Agriculture, Forestry, Fishing and Hunting	66	33	(33)	(49%)	\$66,012	0.12
21	Mining, Quarrying, and Oil and Gas Extraction	39	<10	Insf. Data	Insf. Data	Insf. Data	0.08
22	Utilities	<10	16	Insf. Data	Insf. Data	\$75,630	0.21
23	Construction	1,030	928	(102)	(10%)	\$62,485	0.70
31	Manufacturing	605	456	(148)	(25%)	\$69,287	0.25
42	Wholesale Trade	422	574	152	36%	\$73,667	0.69
44	Retail Trade	5,554	4,740	(814)	(15%)	\$45,152	2.14
48	Transportation and Warehousing	828	725	(104)	(13%)	\$66,569	0.79
51	Information	654	383	(271)	(41%)	\$65,810	0.91
52	Finance and Insurance	890	735	(155)	(17%)	\$128,760	0.77
53	Real Estate and Rental and Leasing	326	271	(55)	(17%)	\$54,713	0.68
54	Professional, Scientific, and Technical Services	572	562	(11)	(2%)	\$73,691	0.36
55	Management of Companies and Enterprises	472	291	(181)	(38%)	\$54,607	0.86
56	Administrative and Support and Waste Management and Remediation Services	349	388	39	11%	\$58,565	0.28
61	Educational Services	171	234	63	37%	\$39,334	0.40
62	Health Care and Social Assistance	6,310	7,089	779	12%	\$81,030	2.35
71	Arts, Entertainment, and Recreation	300	314	14	5%	\$43,705	0.84
72	Accommodation and Food Services	2,854	2,838	(16)	(1%)	\$34,794	1.55
81	Other Services (except Public Administration)	1,001	936	(64)	(6%)	\$42,903	0.78
90	Government	1,548	1,557	9	1%	\$88,518	0.45
99	Unclassified Industry	0	0	0	0%	\$0	0.00
Total		23,996	23,079	(917)	(4%)	\$64,271	

Source: EMSI

We also examined industries by Gross Regional Product (GRP) to understand the value of industry's goods and services. The table below displays the GRP for Hyannis, Barnstable County, and Massachusetts. As of 2020, Hyannis' GRP was approximately \$2.4 billion with Health Care and Social Assistance contributing 28.4% of that followed by Retail Trade (15.1%) and Finance and Insurance (10.4%). Nearly half (47%) of the Health Care and Social Assistance Gross Regional Product in Barnstable County is concentrated in Hyannis. As such, Hyannis has a significantly larger proportion of its GRP in that industry at 28.4% compared to 13.25 in Barnstable County, and 10.3% in Massachusetts.

Hyannis' economy is less diversified than the other geographies which presents potential challenges. Interviews noted opportunities to leverage blue economy, healthcare, entrepreneurial ecosystem, as well as artists to further diversify jobs and industry within Hyannis.

¹ Location quotient (LQ) is a measure of industry concentration, indicating how concentrated a certain sector is in a given area of study, relative to the nation. It can reveal what makes a particular region "unique" in comparison with the national average. A location quotient greater than 1 indicates that sector employment in the study area is more concentrated than it is at the national level.

Gross Regional Product by Geography, 2020				
NAICS	Description	Hyannis (02601)	Banstable County	Massachusetts
11	Agriculture, Forestry, Fishing and Hunting	\$5,473,492	\$83,322,483	\$1,086,544,916
21	Mining, Quarrying, and Oil and Gas Extraction	\$3,580,167	\$15,545,599	\$366,388,251
22	Utilities	\$4,673,665	\$210,388,880	\$8,385,313,053
23	Construction	\$101,719,057	\$1,078,867,846	\$25,221,532,811
31	Manufacturing	\$57,769,387	\$384,912,448	\$52,327,121,694
42	Wholesale Trade	\$105,400,300	\$324,519,963	\$30,719,597,686
44	Retail Trade	\$359,292,763	\$1,134,766,342	\$27,348,409,004
48	Transportation and Warehousing	\$103,535,505	\$234,632,869	\$10,810,297,756
51	Information	\$94,631,864	\$307,960,168	\$36,985,197,779
52	Finance and Insurance	\$246,970,047	\$826,643,253	\$68,136,349,091
53	Real Estate and Rental and Leasing	\$48,212,290	\$397,066,611	\$14,601,503,621
54	Professional, Scientific, and Technical Services	\$84,584,501	\$764,570,442	\$76,971,285,437
55	Management of Companies and Enterprises	\$52,987,903	\$75,948,735	\$12,945,420,889
56	Administrative and Support and Waste Management and Remediation Services	\$32,927,850	\$403,656,544	\$16,431,858,408
61	Educational Services	\$10,594,629	\$79,901,120	\$18,369,202,850
62	Health Care and Social Assistance	\$675,869,492	\$1,423,041,257	\$55,110,903,646
71	Arts, Entertainment, and Recreation	\$20,220,182	\$233,886,837	\$5,894,418,994
72	Accommodation and Food Services	\$169,864,522	\$831,675,541	\$14,128,773,425
81	Other Services (except Public Administration)	\$61,197,539	\$354,062,772	\$10,560,683,471
90	Government	\$142,340,700	\$1,633,496,905	\$50,157,870,710
Total		\$2,381,845,855	\$10,798,866,615	\$536,558,673,492

Source: EMSI

Gross Regional Product by Geography, 2020				
NAICS	Description	Hyannis (02601)	Banstable County	Massachusetts
11	Agriculture, Forestry, Fishing and Hunting	0.2%	0.8%	0.2%
21	Mining, Quarrying, and Oil and Gas Extraction	0.2%	0.1%	0.1%
22	Utilities	0.2%	1.9%	1.6%
23	Construction	4.3%	10.0%	4.7%
31	Manufacturing	2.4%	3.6%	9.8%
42	Wholesale Trade	4.4%	3.0%	5.7%
44	Retail Trade	15.1%	10.5%	5.1%
48	Transportation and Warehousing	4.3%	2.2%	2.0%
51	Information	4.0%	2.9%	6.9%
52	Finance and Insurance	10.4%	7.7%	12.7%
53	Real Estate and Rental and Leasing	2.0%	3.7%	2.7%
54	Professional, Scientific, and Technical Services	3.6%	7.1%	14.3%
55	Management of Companies and Enterprises	2.2%	0.7%	2.4%
56	Administrative and Support and Waste Management and Remediation Services	1.4%	3.7%	3.1%
61	Educational Services	0.4%	0.7%	3.4%
62	Health Care and Social Assistance	28.4%	13.2%	10.3%
71	Arts, Entertainment, and Recreation	0.8%	2.2%	1.1%
72	Accommodation and Food Services	7.1%	7.7%	2.6%
81	Other Services (except Public Administration)	2.6%	3.3%	2.0%
90	Government	6.0%	15.1%	9.3%

Source: EMSI

RETAIL MARKET

According to 2020 EMSI data, the Retail Trade industry comprised 15.1% of Hyannis' Gross Regional Product compared to 5.1% in the State of Massachusetts. This strong retail presence is focused on Department Stores, Grocery Stores, Automobile Dealers, Building Material and Supplies Dealers, Health and Personal Care Stores, and Clothing Stores in Hyannis.

Based on interviews and survey feedback, there is a perception that Downtown Hyannis is not for residents during the tourist season and current retail offerings do not entice residents to make a trip downtown. Others noted the perception of homelessness and that feeling unsafe deters locals from shopping downtown. Recognizing these challenges, there are several initiatives and organizations within the community that are actively working to promote downtown visitation and efforts to shop locally.

The quality of existing retail space in Hyannis varies by building. Prior to the pandemic, retail space was growing in the county with rental rates rising an average of 0.8% annually. During the pandemic, between 2020 and 2021, retail rents remained unchanged in Barnstable. As of 2021Q1, there are over 38,000 SF of general retail space under construction in the town as a result of industrial repurposing. All of the retail space under construction is located in Hyannis and includes a 6,000 SF at 451 Iyannough Rd in Hyannis that is expected to be complete by Spring 2021, a 32,300 SF building at 548 Bearses Way that is expected to be complete by September 2021, and a WS Development in the Kmart Plaza along Iyannough Road that is expected to serve as a lifestyle center. Development of retail space off of Main Street represents competition for Main Street retailers as people are drawn away from the downtown environment to shop.

As of 2021Q1, retail vacancy was 2.8% in Barnstable County with rents around \$17 per SF. ² Looking forward market rents can expect to regain momentum in 2022 as COVIDs impacts subside.

OFFICE MARKET

The COVID-19 pandemic has a significant impact on office space with many employers leaving their offices to adhere to health and safety protocols. The uptick in remote work led to companies permanently reducing or forgoing office space altogether. Historically, office space in Hyannis (02601) was impacted by declining jobs in industries that typically occupy office space. Between 2006 and 2021, Information, Finance and Insurance, and Management of Companies and Enterprises shed 271, 155, and 181 jobs, respectively. The closure of the TD Bank property in Hyannis further added to the office vacancy in Hyannis. However, as of Summer 2021 a new owner has secured the property and is working through the beginning phases of redevelopment.

Prior to the pandemic, the office market in the Barnstable County had grown at a rate of 1.5% per year. When COVID struck in 2020, office rents declined by 0.4% in the county and halted construction of office space. As of 2021, office vacancy is approximately 5.1% in the county while market rents are around \$20 per SF. Based on conversations with local real estate professionals, smaller office spaces in Hyannis go quickly while larger footprints often have to be discounted to secure tenants. Additionally, the lack of elevators hinders the marketability of second-story office space downtown. The office market in the town is expected to regain market growth in 2022, which aligns with national expectations.

² CoStar

MULTIFAMILY

As the urban hub of Cape Cod, Hyannis caters to many multifamily and rental housing options. According to Esri, 42% of the housing units in Hyannis are rental occupied compared to 21% in the town and 18% in Barnstable County. As of 2019, the median rent in Hyannis was approximately \$1,233 compared to \$1,336 in the town and \$1,311 in the county. Currently, the majority of the multifamily stock in Barnstable caters to workforce housing with few luxury offerings. Conversations with downtown businesses indicate that their workforce commutes into Hyannis for work and that if quality offerings were available downtown they believe a portion of their workforce would live downtown and walk to work.

Sea Captains Row is underway on Pleasant Street and will add one-, two-, and three-bedroom apartment offerings to downtown Hyannis. Rental rates for this development are expected to start at \$1,675 per month for one-bedrooms. In addition to Sea Captains Row, the former Twin Brooks Golf Course which is located outside of the BID District is proposed to be redeveloped into a 319 unit apartment complex with a clubhouse and swimming pool.

These proposed developments represent an opportunity to diversify the housing offerings in Hyannis. However, more can be done to increase the offerings at a variety of price ranges. Stakeholder interviews noted that a significant challenge and hindrance to economic development in Hyannis is the lack of quality, year-round housing options that are affordable to workers. Some indicated there is a desire for a cap on short-term rentals, renovation to underutilized second-story buildings in downtown, and additional multifamily options.

COMMUNITY ASSETS

Hyannis benefits from having a local government, economic development organizations, and community stakeholders that are passionate about bettering the village. The Town of Barnstable and the Hyannis BID have worked hard to increase arts and culture and economic development activities within Hyannis. With the Town undergoing a process to update zoning and the BID marketing Hyannis year-round to support events, Hyannis is well-positioned to continue transforming into a vibrant community. A Downtown Hyannis Action Strategy Survey was conducted and as part of the survey, respondents were asked to indicate words that come to mind when they think about the current downtown Hyannis. Positive perspectives noted in the survey were downtown's potential, liveliness, interesting character, and improvements.

During this project's engagement, interviewees and survey comments indicated how Hyannis' population has grown in diversity from Cape Cod's JFK era. This diverse community of fabric is not reflected in the retail and entertainment offerings along Main Street and leads to a perception of a lack of culture for downtown Hyannis. Hyannis' diversity can be leveraged to create a unique offering that displays the current population and is not found elsewhere on the cape.

The human services on Cape Cod are concentrated in Hyannis. This along with several transportation hubs including the Hyannis Transportation Center, Hyannis Harbor, and major roadways such as US-6 provide a more urban environment than other villages. As such, Hyannis is the downtown hub for Cape Cod. These community assets that place it in a unique position on the Cape to position as a more economically resilient year-round community. It was brought up in interviews that people go to Cape Cod to get away from the city and therefore seek to enjoy the outdoors and beaches while on vacation. However, downtown Hyannis can be better marketed to tourists as an opportunity to mix up their vacation and enjoy a downtown environment.

3. ECONOMIC DRIVERS

Place-based economic strategies require a holistic approach encompassing not only building, site availability, and private sector investment, but also the quality of life amenities and sustainable business practices (among other considerations listed below). Camoin examined the economic drivers within Hyannis by reviewing past reports and planning efforts, conducting stakeholder interviews, and conducting a public open house which revealed both opportunities and deterrents to growth. These findings help to articulate economic development capacity within the Hyannis community.

TOURISM AND HOSPITALITY ENVIRONMENT

WHAT WE ARE HEARING:

Tourism is the primary driver of Hyannis' economy with over 4,700 jobs in Retail Trade and 2,800 in Accommodation and Food Services. Over time, the tourism in Cape Cod and Hyannis has extended farther into the fall and earlier into the spring which has allowed more businesses to stay open year-round. Downtown Hyannis itself is a tourist attraction with retail and eateries along Main Street and neighboring transportation hubs and harbor.

Major tourist attractions in Hyannis include the Steamship Authority, Hy-Line Cruises, John F Kennedy Museum, John F Kennedy Memorial, and Cape Cod Maritime Museum. The Steamship Authority and Hy-Line provide ferries to Martha's Vineyard and Nantucket and draw in thousands of visitors each year. However, many of these visitors pass through without visiting downtown Hyannis despite it being within walking distance of the port. In addition to these larger assets, the Town, Hyannis BID, Love Live Local, and other organizations have made strides in enhancing downtown and promoting it as a year-round destination. Efforts include a Walkway to the Sea, artist shanties, several social media campaigns, signage and wayfinding improvements, programming, and more.

Hyannis' Main Street experience is not cohesive with the east and west ends offering different shops, food, and experiences. Between the two Main Street nodes, are social services buildings. Store facades vary and it was noted there is a need for façade improvements especially within the east end. Residents often visit the west end without walking to the east end.

The village green was noted as a great asset that could be better programmed. Some interviewees noted that there is a lot of unpleasantness tied to the village green specifically with homelessness and drug use. Others noted the village green as a great family location.

While Hyannis is considered the hub of Cape Cod and is a major waypoint for visitors, local and regional residents noted there is little in downtown Hyannis that warrants them to visit downtown. One interviewee described the downtown as a "hodgepodge of stuff" with others indicated that the appearance needs to change or else they fear the area will not succeed. Respondents from the Downtown Hyannis Action Strategy Survey indicated that events, more places to shop, and more places to eat would draw people to downtown. Other things that would draw people downtown include more/free/easier parking, coffee shops, fine dining, ethnic food, and a better overall appearance. Overall, the majority (78%) of survey respondents are interested in projects for Downtown Hyannis that impact small businesses.

PERCEIVED CONSTRAINTS:

- Lack of unified visitor experiences is resulting in low visibility of Hyannis attractions.

- Currently, there is not a high-quality accommodation offering in Downtown Hyannis.
- Strong perception that parking challenges exist and therefore are inhibiting local and regional residents and visitors from traveling to downtown Hyannis.
- Lack of high-quality and unique shops and food offerings.

PERCEIVED OPPORTUNITIES:

- Develop a cohesive plan for Main Street that recognizes that east and west end are different. There is a need to create goals and objectives that projects can be evaluated against
- Capture a portion of the Nantucket and Martha's Vineyard residents and visitors that travel through Hyannis to get to the port.
- Several interviewees and survey respondents indicated there is a strong desire for the farmers market to return. A study should be conducted to understand why the previous one failed and what needs to be done to help one succeed.
- Enhance family-friendly activities and experiences downtown. Including increasing programming for the village green to include lighting and program opportunities. Noted additions for family-friendly activities include a splash pad downtown, eateries, and shops.
- Increase visitation by marketing downtown Hyannis for day trips to attract regional visitors.
- Attract a brewery or micro producer downtown that serves as a tourist destination as well as a resident asset.
- There is an overall need to increase the mix of establishments downtown including specialty food stores, bakery, café, etc
- Continue enhancing the appeal of Hyannis through beautification projects to take care of sidewalks, trash, etc. Several interviewees and survey respondents noted that the look of downtown needs to change to attract visitors and residents to downtown.

ARTS AND CULTURE ASSETS

WHAT WE ARE HEARING:

The Town of Barnstable and the BID have worked hard to increase arts and culture activities in Hyannis. However, more work needs to be done.

The major cultural assets in Hyannis include JFK Museum and Memorial that build on Cape Cod's JFK era. There is a desire among Cape Cod residents to further expand cultural offerings in Hyannis to include the new-age culture of Cape Cod and Hyannis including sites targeted towards the blue economy, Cape Cod Railway, a performing arts center, and more.

The artist community is primarily served by the HyArts Arts campus and the seaside shanties in Hyannis Harbor where local and regional artists sell their goods. Currently, the arts environment in Hyannis is focused on sea and vacation art with few opportunities to sell local art outside of that realm. Interviewees noted that artists often travel off of the Cape for studio, gallery, and exhibition space.

PERCEIVED CONSTRAINTS:

- Current marketing efforts for Cape Cod overlook the diverse population of Hyannis.

- Artists in Hyannis often lack capital for start up, marketing, and business development.
- It was noted that the current art environment in Hyannis is not always inclusive towards people of color (POC).

PERCEIVED OPPORTUNITIES:

- Connect arts and culture to economic development initiatives.
- Involve art community in marketing efforts and planning initiatives as well as engage the diverse population of Hyannis in planning efforts.
- Work with local businesses and property owners to host gallery and studio space that displays art from local artists. This can include pop-up gallery space that showcases the art and fabric of the community.
- Continue building out art walk including enhanced lightening and wayfinding to the walk to the sea.
- Investment and attraction to develop a performing arts space or concert hall that can accommodate a wide array of events including local performers, artists, and musicians. Continue conversations to attract the Cape Cod Symphony to this space once developed.
- Develop a shared commercial kitchen space to allow bakers and chefs to continue developing their businesses without requiring large start-up costs.

LEADING INDUSTRIES

WHAT WE ARE HEARING:

Hyannis' economy is primarily driven by tourism and the service industry along with a large presence of Health Care and Social Assistance jobs. Many of the tourism and service industry's businesses downtown lack the capital needed to make improvements to their properties or further develop their businesses.

As of 2021, there were over 7,000 jobs in Health Care and Social Assistance. Cape Cod Hospital is a larger employer in Hyannis and has plans to expand its operations to support additional jobs in the area.

During the COVID-19 pandemic, Cape Cod saw a surge in visitors due to remote work along with increased competition in the housing market from people outside of Cape Cod. As social distancing protocols subside there is an opportunity for the Town of Barnstable to continue offering an environment for remote workers to thrive in as decentralized working continues post-pandemic. Continuing to build out fiber networks and offering spaces for these workers to cowork will work to attract both remote workers and entrepreneurs. It was also noted that despite high education levels within Cape Cod there are few tech businesses present downtown.

Cape Cod is also promoting blue economy jobs (i.e. those related to various maritime-based industries). Cape Cod Chamber is supporting entrepreneurship including having a blue economy foundation to give people opportunities to grow and develop their products in the blue economy realm.

Interviewees noted that a challenge facing all industries is the price of real estate. Development costs and rental rates are making it cost-prohibitive for some businesses and driving local businesses out of the area.

PERCEIVED CONSTRAINTS:

- Currently, there are limited high education opportunities that provide STEM degrees, training, and skills.
- Finding labor is a challenge. Businesses in Hyannis that want to expand on the Cape but face challenges finding quality workers that they can afford to support.

- High costs of living on Cape Cod make it difficult to find workers to support lower-wage jobs.

PERCEIVED OPPORTUNITIES:

- Increase job opportunities in nonservice industries.
- Job preparation and training programs to combat area's labor shortage.
- Cape Cod Hospital is a major employer within Hyannis. As of 2021, the hospital expressed plans to expand within Hyannis to add jobs to the local community. The Town can help to provide leadership and assistance in helping see this project to fruition. The Town of Barnstable should work with other government and economic development partners to facilitate that growth.
- Conduct a study to understand the feasibility of a coworking space in downtown Hyannis.
- Growing the entrepreneurial ecosystem through supporting fiber buildout and incentives to support start-up businesses acquiring footprints downtown.
- Communication with the Town and businesses can be improved through increased engagement. Allowing the Town to understand the challenges that businesses face and their growing needs can help to alleviate economic challenges before they occur.
- Offer low-interest business loans and incentives to establish businesses such as micro-producers (i.e. a brewery) downtown. These businesses need affordable rents and/or incentives to ease the financial strain in the beginning and be sustained downtown.

TRANSPORTATION HUBS

WHAT WE ARE HEARING:

Hyannis is home to several major transportation nodes that allow for visitors and residents to travel by road, rail, bus, or ferry including the Hyannis Transportation Center, Hyannis Harbor, and major roadways including US-6 into Chatham. In their current state, the Hyannis Transportation Center and Hyannis Harbor are poorly connected to downtown Hyannis. Over the years there have been efforts to increase the wayfinding and marketing of these transportation nodes to downtown yet it is not always clear to visitors how to go from one location to another. Furthermore, roads leading into Hyannis were noted as subpar, congested, and unscenic entrances that led to unmemorable experiences for visitors and those passing through.

Currently, community stakeholders indicate that there are walkable sections of the main street but the street in its entirety is not a walkable experience. Additionally, parking concerns in Hyannis include costs of parking, difficulty finding parking spots during tourist season, etc.

The Cape Cod Regional Transit Authority is also working to decrease car congestion and enhance ridesharing in Cape Cod including developing a SmartDOT ride-hailing application for affordable transit and the Hyannis trolley system.

PERCEIVED CONSTRAINTS:

- Car dependence on the Cape is impeding the walkability of downtown.
- There is a strong presence of privately-owned parking lots. Many of these lots are not cohesive and it is noted that visitors and residents often do not know which lots are town-owned and which owns are privately owned.

PERCEIVED OPPORTUNITIES:

- Develop a gateway entrance into Hyannis.
- Improve walkability downtown.
- Create transient boat slips so that people can visit from other communities.
- Leverage art for wayfinding to draw visitors to and from transportation nodes.
- Enhance the travel corridors in and out of Hyannis to create an attractive gateway to downtown.
- Work with owners of private parking lots to create aesthetic improvements, formalized signage, and landscaping as outlined in the *2010 Hyannis Harbor Land Use Analysis and Economic Development Strategy*.
- Create of Lewis Bay Garage with 400 spaces and shuttle as outlined in the *2010 Hyannis Harbor Land Use Analysis and Economic Development Strategy*.
- Seek partnerships either through a New Parking Authority or the town for parking garage investment and engage a consultant to test the financial viability as identified in the *2010 Hyannis Harbor Land Use Analysis and Economic Development Strategy*.
- *Hyannis Parking Redevelopment Study 2014* has projects to determine the approach to consolidate more ferry parking, engage private parking lot owners in redevelopment opportunities, and foster connections between downtown and the waterfront.
- Carry out projects outlined in the *2018 Downtown Hyannis GIZ Application* including projects for road improvements, traffic signal upgrades, road reconstruction, and design, improvements to East Main Street.
- Carry out projects outlined in the *Cape Cod CEDS 2019 – 2024* including plans to promote actions to reduce traffic and greenhouse gases such as public transit expansion feasibility analysis, regional multiuse path, electric transit, Hyannis access build-out, expand commuter rail to Hyannis.
- Increase bicycle ridership and accessibility including infrastructure to support that as identified in the *2010 Hyannis Harbor Land Use Analysis and Economic Development Strategy*.

HOUSING DEVELOPMENT OPPORTUNITIES

WHAT WE ARE HEARING:

The housing stock on Cape Cod is predominately single-family homes with apartment options often being pricey. It is challenging for workers in Hyannis to find quality rental options within their price ranges. As a result, many of the employers including the hospital noted that their workforce lives in neighboring towns and villages with some even commuting from off of Cape Cod.

Recognizing that the rent-to-income ratios are off in Cape Cod, there is a strong desire for the addition of workforce housing options within Hyannis. Within the community, local organizations are working with local banks to promote equitable loan approaches to help with diversity, equity, and inclusion for homeowners. The community also hosts homeownership classes.

The increasing prevalence of short-term rentals is a concern among the community. Community stakeholders believe these short-term rentals are interrupting opportunities for local workers to afford rental opportunities as well as reducing the overall supply of rentals and homes for sale.

There are currently housing developments underway in Hyannis. Most notable, the Sea Captains Row development on Pleasant Street is expected to add 58 market-rate units to the market and provide future tenants with walkable accommodations while also having high-speed fiber connections.

PERCEIVED CONSTRAINTS:

- Various property owners not having a cohesive vision or vested interest in downtown. There is a significant proportion of property owners who are absentee owners.
- Cost of development is high due to an aging labor pool that is not being backfilled and high cost to transit materials to Cape.
- Hyannis has several historic properties which are costly to maintain. Furthermore, conversations with local community members indicated that the historic board can make it challenging for property owners to navigate projects and development.

PERCEIVED OPPORTUNITIES:

- Increase year-round rentals by incentivizing and supporting multifamily development.
- Explore options to develop a cap on short-term rentals.
- Increase diversity of housing through for sale and rental options varying from single-family homes, condos, and apartments.
- Continue to support organizations that promote housing ownership classes and financing literacy to increase homeownership throughout the Cape.
- Explore opportunities to develop identified underutilized properties including Pufferbellies and Cascade Motor Lodge.
- Explore opportunities to develop mixed-use properties near the harbor to promote work, life, play in downtown Hyannis.
- Get more people living on Main Street by incentivizing property owners to develop underutilized buildings and second-story spaces.
- Utilize state funding such as MassDevelopment direct lending to incentivize projects that are needed.

LAND USE PLANNING AND ZONING REGULATIONS

WHAT WE ARE HEARING:

The Town of Barnstable is comprised of seven villages – each unique with its needs and opportunities. As the hub of Cape Cod, the Village of Hyannis is a unique community within the Cape that requires more thought-out planning and zoning to create a vibrant, walkable, and sustainable downtown. In its current state, the Town of Barnstable does not have a uniform feeling throughout and that disjoint-ness is further amplified in Hyannis. Market forces, traffic flow, and social need have created a divide between east and west end Main Street. Infill of social services along Main Street along with uniformed facades is resulting in a current divide in east and west Main Street. Often visitors to one end of Main Street do not visit the other and thus the time visitors spend downtown is limited.

Throughout the engagement process of this project, it was indicated that the Hyannis building department is known to take a long time in the community. While this is not currently a hindrance to development the drawn-out planning and development processes are regarded as an inconvenience. Currently, development and redevelopment projects

in Hyannis are looked at on an independent basis rather than looking at them as an overall development vision and for Hyannis, the Town of Barnstable, or Cape Cod.

It is the perception of some that the Town takes the back seat on planning processes and the planning board does not push back on developers when projects are proposed that do not align with the perceived vision of downtown. Furthermore, the Town has little to no influence on landlord-tenant relationships.

The planning process in Hyannis is often comprised of similar parties and community members. As the community fabric of Hyannis continues to grow and diversify there is a need to increase community engagement in planning processes to include businesses and populations currently not represented.

Survey comments indicate there is a desire for the entirety of Hyannis to be a Growth Incentive Zone. Currently, the Town of Barnstable is undergoing a form based code process to develop new planning and zoning regulations. Several interviews stated that they were excitedly anticipating the results of this process.

PERCEIVED CONSTRAINTS:

- Lack of elevators to second-floor properties downtown leading to underutilized second floor space.
- There are a significant number of properties downtown owned by non-profit groups which do not contribute to the town tax base.
- Current zoning challenges and perceptions of the town not being flexible.
- Challenges working with the historic commission.

PERCEIVED OPPORTUNITIES:

- Develop a conscientious, innovative planning vision to develop underutilized properties and parcels in downtown Hyannis to their highest and best use. This will require all villages within the Town of Barnstable to communicate and collaborate on planning and zoning regulations.
- Enhancing the streetscape in downtown Hyannis to be walkable and human-centric.
- Promote planning and zoning to redevelop underutilized second-floor office space downtown into multifamily offerings and class A commercial space.
- Focus development planning on context and community to create fine-grained plans rather than plans for individual buildings.
- Utilize civic leaders and town government to develop Hyannis – especially for large, transformative developments.
- Work with the planning, zoning, and historic building departments to make the development process easy.
- Create sell sheets for specified parcels to attract developers.
- Involve younger generation in planning efforts to get their input as well as create community buy-in to help retain residents.
- Utilize state, federal, and local funding to develop façade programs to create a cohesive look downtown.

OUTLOOK FOR INFRASTRUCTURE NEEDS

WHAT WE ARE HEARING:

Community stakeholders and developers noted that high infrastructure costs and taxes are inhibiting development in Hyannis. It was noted throughout interviews that Hyannis often bears the brunt for the Town of Barnstable when it comes to shouldering the municipality's tax burden. Furthermore, separate infrastructure systems from all the villages lead to numerous water, fire, and cleanup taxes making it difficult to compare property costs from one village to another.

Most notably, the high costs of water hook-ups in Hyannis were driving how sites are being developed as hookup fees are a major cost in the development process. Some interviewees regarded the rules and regulations associated with the water department were as "archaic" and in need of an overhaul.

Broadband expansion is another infrastructure need in Cape Cod. OpenCape is working to build out the fiber connections on Cape Cod to help communities increase connectivity to support both residents and businesses.

PERCEIVED CONSTRAINTS:

- Cost of construction is higher on Cape Cod due to the dwindling labor pool in trades, cost to transport materials, etc.
- Developers, utility companies, and the town planning department are not fully aware of work being conducted in each department and thus opportunities for collaboration are not fully utilized.
- High infrastructure costs and taxes are associated with old infrastructure, historic properties, and previous remediation.

PERCEIVED OPPORTUNITIES:

- Need collaboration between infrastructure authorities, developers, and the planning department.
- Collaborate with OpenCape on fiber build-out. OpenCape is actively tracking funds to leverage in communities to transition to make ready.
- Work with local construction partners to source municipal construction projects and services.
- Utilize state and federal funding streams to build out infrastructure to support businesses and residents.

4. DOWNTOWN HYANNIS: FORWARD TOGETHER

Hyannis's downtown strategy is designed to be actionable and attainable, building from and synthesizing current and planned projects and initiatives to achieve the future vision for the community. This section sets forth a vision for Downtown Hyannis, followed by a detailed action plan for reaching that vision.

ENVISIONING OUR DESIRED FUTURE

The future vision for Downtown Hyannis is organized around core elements that make up a vibrant downtown. In addition to creating a vision statement for each element, the table below summarizes existing conditions from the above analysis representing the 'status quo', alongside projects that are either underway or planned. Comparing the status quo to the vision statements allowed the project team to assess how well the current projects and initiatives from prior planning efforts contribute to achieving the vision for Downtown Hyannis, and where additional actions are needed.

VIBRANT DOWNTOWN ELEMENTS

1. Economic Development Framework
2. Ecosystem
3. Financing
4. Place
5. Built Environment
6. Infrastructure
7. Transportation
8. Economic Diversity
9. Innovation & Entrepreneurship
10. Business Environment
11. Real Estate Market
12. Human Diversity
13. Marketing, Communications, and Engagement
14. Arts and culture
15. Regulatory/Government Role

Economic Development Framework

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
	<ul style="list-style-type: none"> Hyannis benefits from a BID, marketing, and programming. Town has Economic Development staff focused on marketing, planning, and arts and culture. Partners include Love, Live, Local, Greater Hyannis Chamber of Commerce, Cape Cod Chamber of Commerce, etc. 	<ul style="list-style-type: none"> Business retention and expansion (BRE) Program focused on main street businesses. Workforce and Business Retention Program (Cape Cod CEDS 2019 – 2024). Economic Sector Impact Assessments to assess the economic impacts of key and emerging industry sectors and identify industry cluster development opportunities based on supply chain analysis (Cape Cod CEDS 2019 – 2024). Tourism and Leisure Economy Assessment (Cape Cod CEDS 2019 – 2024). 	<ul style="list-style-type: none"> The Town of Barnstable maintains a data-driven 'smart' business retention and expansion (BRE) program where each main street business is engaged at least once a year through multiple channels (digital, calls, visit, etc.). A BRE Program Manager from Town's economic development staff to lead program. Hyannis is recognized as a signature regional asset and supports vibrant businesses, residents, and workers. Becomes a distinguishing factor for the region. (Example: Saratoga Springs, NY) Expanded capacity through networking and collaboration of economic development and community organizations. Boards, staff, and/or members of economic and community development entities reflect the wealth of diversity that exists in the community (i.e. race/ethnicity, different sectors, including arts/culture voices). Enhanced partnerships focused on action and implementation of economic development projects and initiatives.

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
Ecosystem	<ul style="list-style-type: none"> Lacks cohesive plan for East and West end of Main Street. Hyannis remained flexible throughout COVID including allowing for one-way streets and group efforts that raised funds for local businesses. 	<ul style="list-style-type: none"> The Creative Approaches to Moderate Density 2019 aims to focus revitalization on the East End of Hyannis with a focus on a variety of housing choices with an emphasis on affordable ownership. Wayfinding signage funding to support the 2008 Hyannis Signage Plan (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010). Gateway access consideration (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010). 	<ul style="list-style-type: none"> Main Street Hyannis is connected to other economic hubs throughout the region and core issues and priorities are addressed collaboratively. Enhanced internal Hyannis connections (i.e. connecting Main Street to Harbor) as identified in the Downtown Hyannis Public Spaces Activation 2021. This includes lighting improvements, removal of objects to optimize site lines, enhanced entrances to the Green, improved crosswalks, etc. Sense among the community is that downtown Hyannis is for everyone, and everyone has a responsibility to support and invest in it to make it their own.
	<ul style="list-style-type: none"> TIF and Opportunity Zones (OZ) are available. MassDevelopment can help leverage funding from other partners for large projects. Amplify POC is working with local banks to improve access for minority entrepreneurs and business owners. Amplify POC is providing economic literacy classes to BIPOC entrepreneurs. 	<ul style="list-style-type: none"> Active effort to incentivize façade improvements. Educate and lower barriers for BIPOC to obtain funding to become business owners and purchase homes (Amplify). Hyannis TDI Workplan 2020 aims to promote the availability of existing financing programs like the Micro-Enterprise Loan Program and serve as a point source for conveying information and resources to the small business community that has been affected by COVID-19. 	<ul style="list-style-type: none"> Capital is raised for main street projects through community and regional investment. Examples include Crowdfunding into downtown projects (ex: Neighborhood Ventures). Variety of financial tools are available to pitch and sell to investors. (ex. City of Brockton incentive overlap.) Funding is available for façade improvements. District improvement financing (DIF) district has been evaluated and established.

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
Place	<ul style="list-style-type: none"> • Main Street has a direct connection to the ocean. • Main Street has good individual places that locals visit on single-point trips (restaurants, high-end shopping). • Tourists will come visit to walk parts of downtown for a few hours. Many tourists that travel to Hyannis to use the ferry do not visit downtown. • Young professionals are currently being attracted to the area from larger metro areas as a result of COVID. • Village Green is a significant asset. 	<ul style="list-style-type: none"> • Recommendations in the Downtown Hyannis Public Spaces Activation including lighting and façade improvements, wayfinding, prioritization of viewing the harbor, improved pedestrian experience, preservation of open space, and programming and events. • Utilize creative approaches to fill major gaps in the retail frontage (Retail Market Analysis and Positioning Strategy 2019). • Gather more detailed information on Main Street foot traffic (Retail Market Analysis and Positioning Strategy 2019). • Insist on zero-setback retail fabric on Main Street for existing storefronts and new development between Old Colony Road to Sea Street to bring pedestrians closer to the businesses (Retail Market Analysis and Positioning Strategy 2019). 	<ul style="list-style-type: none"> • Hyannis is a year-round place that people want to be and interact with through many experiences, visiting many businesses and amenities throughout a visit. • Enhanced public realm downtown including public rights-of-way, sidewalks with benches, public space, and roads downtown. • Increased utilization of downtown by residents. • Ocean Street Hotel has been developed. (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010). • Downtown Hyannis draws in visitors to nearby islands who either take the ferry or airport. Visitors coming and going on the ferry spend time downtown prior to their departure.

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
Built Environment	<ul style="list-style-type: none"> Developed organically over time through market forces, traffic flow, and social need which has created a divide between east and west Main Street. Large buildings with setbacks create an inconsistent environment. Aesthetics need re-investment – building facades, streetscaping, etc. 	<ul style="list-style-type: none"> Town of Barnstable is in the final phases of the process to update zoning, which will consolidate districts and include a hybrid form based code to encourage mixed use and overall housing development in the downtown. An accessory dwelling unit (ADU) ordinance is also underway which may impact development surrounding downtown. Relax permitted retail uses in the HVB Hyannis Village Business District zone (Retail Market Analysis and Positioning Strategy 2019). Regulating for Housing and Economic Diversity (Cape Cod CEDS 2019 – 2024). Hyannis TDI Workplan 2020 is working to identify key gateways and pathways between the Harbor and Main Street to encourage the flow of users. RESET Project: Assessing Centers of Activity(Cape Cod CEDS 2019 – 2024). 	<ul style="list-style-type: none"> Infill initiatives create a connected downtown with housing, jobs, retail, food, and entertainment. Streets and sidewalks are inviting, clean, accessible, and complete with wayfinding so that residents and tourists can easily navigate downtown. Top of shop housing efforts are carried out and there are increased residents downtown. Development downtown considers taller buildings for increased density and parcels are developed to their highest and best use. (ex: Burlington, VT – Church St.) Enhanced street design that allows for the appropriate right of way for vehicles as well as pedestrian and bicyclist space.

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
Infrastructure	<ul style="list-style-type: none"> • Basic infrastructure is in place and adequately supporting businesses. • Some buildings have fiber, but most do not. • High infrastructure costs and high tax rates. • Water/Sewer Hookup costs are very high. Regulations imposed by water department are influencing development design/site layout – for developers to propose multiple duplexes instead of larger multi-unit buildings. • Concerns of parking and road safety. 	<ul style="list-style-type: none"> • Spreading the cost of infrastructure among residents, seasonal homeowners, and visitors including congestion pricing on bridges, last-mile buildout fund, lodging tax set aside for infrastructure, expand infrastructure funding, and jet tax. • Cape Cod CEDS 2019 – 2024 includes projects to buildout the last mile of broadband and waster infrastructure in centers of activity. • Cape Cod CEDS 2019 – 2024's plan to improve infrastructure planning to promote greater efficiency and coordination in infrastructure projects to protect the region's resources and improve resiliency. Includes regional capital plan, natural and green infrastructure assessment, Cape-wide drinking water plan, local water quality planning, and zero waste policies. • Wastewater Treatment Innovation and Testing Center (Cape Cod CEDS 2019 – 2024). • Convert Main Street to two way traffic (Retail Market Analysis and Positioning Strategy 2019). • Explore the possibility of converting Ocean Street to pedestrian-only during peak season (Retail Market Analysis and Positioning Strategy 2019). 	<ul style="list-style-type: none"> • Every building, residential or commercial, is served by fiber and has access to top internet speeds. • Districts and villages to work together on large infrastructure projects (i.e. water, sewer) and improvements to capitalize on economies of scale. Regional co-investment infrastructure build-out and maintenance is attained. This includes collaboration across the villages of Barnstable to capitalize on economies of scale. • Water hookup fees are lowered, which encourages development based on the highest and best use of parcels and is not dictated by water hookup costs or historic zoning. • Infrastructure including water, sewer, electricity, fiber, etc. is updated and infrastructure capacity is not a limiting factor in development. • Town hires a planning/engineering firm to explore two way traffic and enhanced bike lanes and pedestrian options on Main Street.

Transportation

- Sections of Main Street are relatively walkable.
- Opportunity to leverage art for wayfinding.
- Cape Cod Regional Transit Authority is developing SmartDOT ride-hailing application for affordable transit as well as a Hyannis trolley system.
- Travel corridors into and out of Hyannis are rundown, not an attractive gateway into the main street area.
- Discussions about 1-way vs 2-way main street.
- Hyannis Parking Redevelopment Study 2014 has projects to determine the approach to consolidate more ferry parking, engage private parking lot owners in redevelopment opportunities, and foster connections between downtown and the waterfront.
- 2018 Downtown Hyannis GIZ Application includes projects for road improvements, traffic signal upgrades, road reconstruction, and design, improvements to East Main Street.
- Cape Cod CEDS 2019 – 2024 includes plans to promote actions to reduce traffic and greenhouse gases such as public transit expansion feasibility analysis, regional multiuse path, electric transit, Hyannis access build-out, expand commuter rail to Hyannis.
- Increase bicycle ridership and accessibility including infrastructure to support that (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010)
- Parking delivery and capacity projects identified in the Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010 including 1) providing other lower-cost options to service the value users and 2) providing lots or valet service with close convenience
- Work with owners of private parking lots to create aesthetic
- Hyannis is the hub of a regional multi-modal transportation system.
- Main Street is well connected to the waterfront and transportation hubs.
- Increased access to transit opportunities decreases car dependence downtown.
- Streets and sidewalks are safe for pedestrians and bicyclists. Dedicated bike lanes and supporting infrastructure where feasible.
- Sidewalks are an experience complete with benches and are incorporated into the public realm.
- Creation of Lewis Bay Garage with 400 spaces and shuttle (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010).
- New Parking Authority or Town to seek partnerships for garage investment and engage a consultant to test the financial viability of garage (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010).

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
Economic diversity		<p>improvements, formalized signage, and landscaping (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010)</p> <ul style="list-style-type: none"> • Lower parking requirements for specific developments to increase density and pedestrian-oriented character while discouraging visible surface parking lots (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010) 	
	<ul style="list-style-type: none"> • Tourism and service-based economy. • Healthcare and social services are strong anchors. • Higher educational facilities in the Cape do not cater to STEM degrees which hinders the ability to leverage the blue economy and healthcare. 	<ul style="list-style-type: none"> • Trades and Business Development Program to expand trades related workforce and business (Cape Cod CEDS 2019 – 2024). • Identify and develop venues for continuing education and lifelong learning classes (Retail Market Analysis and Positioning Strategy 2019). • Cape Cod Blue Economy Foundation is focusing on developing Blue Economy sector regionally. 	<ul style="list-style-type: none"> • Downtown Hyannis has expanded beyond tourism and healthcare and is a vibrant, year-round mixed-use district that serves the needs of residents, visitors, and the business community as well as draws regional residents to Hyannis. • Businesses within the blue economy and related regional high-growth sectors are located within downtown Hyannis. • Build out of fiber to build and attract high-growth sectors. • Downtown Hyannis attracts and captures year-round remote workers in leading industries, diversifying the talent on the Cape. • Efforts are made to protect the Cape's workforce from being priced out of the local housing market.

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
Innovation and Entrepreneurship	<ul style="list-style-type: none"> Existing EForAll network in Hyannis. Amplify POC is working to increase training and assistance to minority businesses and entrepreneurs. Most new businesses are in tourism and service sectors – tend to start small and stay small. Very few in tech or high-growth, high-opportunity sectors. 	<ul style="list-style-type: none"> Goal 6 in the Hyannis TDI workplan 2020 is to cultivate opportunities that will facilitate organic entrepreneurial growth and enhance the local small business ecosystem. This includes supporting existing businesses and strengthening the tourism economy. Entrepreneurship Revolving Loan Fund (Cape Cod CEDS 2019 – 2024). Business Development Institute (Cape Cod CEDS 2019 – 2024). 	<ul style="list-style-type: none"> A culture of entrepreneurship is felt and experienced and the downtown becomes known for a place of innovation and entrepreneurship. It is supported by multiple networks and connections within and outside of the downtown. Main Street/Entrepreneurship/Tech are all recognized and separate programs and services to support and function collectively within the regional network. Downtown contains hubs for entrepreneurs and innovators to create, connect, and collaborate (Coffee shops, Coworking, Business Support Services, Incubator/Accelerator programming). Remote workers that are attracted to Downtown Hyannis help to further build the entrepreneurship community in Hyannis.
Business Environment	<ul style="list-style-type: none"> West end of Main Street does not get a lot of foot traffic. Retail development along Route 132 draws consumers away from downtown. Many businesses close in winter, creating dead zones downtown. 	<ul style="list-style-type: none"> Establish retail, restaurants, entertainment, and other service businesses that act as a stand alone destination and contribute to the overall allure of Main Street. 	<ul style="list-style-type: none"> Downtown businesses are thriving year-round and include retail, restaurant, entertainment, and other service businesses mixed with commercial office-users in high-growth, high-wage, high-opportunity sectors. Retail/restaurant/service businesses are serving visitors, residents, and the workforce with high-quality goods, services, amenities, and memorable experiences.

Real Estate Market

- Housing access is a challenge – there is a need for more year round housing.
- Desire for cap on short lease terms.
- TD Bank property has recently sold. There is a need to work with the new owner of this property to ensure highest and best use of development.
- Lack of artist studio space.
- Main Street's second-floor space is predominantly office space.
- There has been some downsizing and reconfiguring of office space to meet needs, but no major shift. Small office spaces were popular at beginning of the pandemic.
- Cost of construction is higher on the Cape due to dwindling labor pool in trades and longer supply chains for materials.
- GIZ supported the creation of 104 new housing units since 2006 (2018 Downtown Hyannis GIZ Application).
- The Cape COD CEDS 2019 – 2024 identifies zoning changes for higher density and mixed-use development, facilitating more appropriate development types throughout the region.
- Goal 4 in the Hyannis TDI Workplan 2020 is to ensure that all of the necessary tools, resources, and incentives are available to reduce financial and regulatory barriers and increase financial feasibility for developers that are considering investing in the East End Main Street area.
- Cape-First Construction and Procurement Program works to encourage private developers and municipal governments to use local businesses for construction and other services.
- CCRTA has developed utility easement development scenarios.
- 2018 Downtown Hyannis GIZ Application includes plans to develop an alternative to system development fees required for "Top of Shop" and other mixed use development.
- E-permitting Expansion to encourage towns to adopt electronic permitting (Cape Cod CEDS 2019 – 2024).
- Meeting the needs of year-round residents at every level of affordability. Housing stock offers a diversity of housing types and price-points to accommodate year-round resident needs. i.e. luxury housing options, workforce housing, etc.
- Renovate underutilized second floor office space downtown into multifamily offerings and class A commercial space.
- The market allows for consumer and business services to thrive i.e. bank, coffee shops, and grocery store.
- Support Development of Ocean Street Hotel or boutique hotel downtown to support seasonal residents.
- Housing needs of seasonal workers and visitors are met.
- Town and economic development partners work with property owners to ensure highest and best use of properties. Town and property owners work together to assemble and market transformative parcels downtown that become available.

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
Human Diversity		<ul style="list-style-type: none"> Housing Prototype Library actively engages the developer community to develop a library of housing building prototypes designed to help address regional housing needs, including affordability and mixed use (Cape Cod CEDS 2019 – 2024). Regional housing plan (Cape Cod CEDS 2019 – 2024). 	
	<ul style="list-style-type: none"> Diverse population base is not reflected in Main Street business of Cape Cod image. Increasing number of housing units along and abutting Main Street. Higher concentration of remote workers in the community compared to the state overall (7% vs. 5%). 	<ul style="list-style-type: none"> Amend zoning in GIZ to allow for increased density, expand and improve accessory dwelling unit program, and improve conditions of existing affordable units. Conduct intentional community engagement efforts to make the local boards, committees, and leadership positions more reflective of the people who live in Hyannis. Community residents and visitors are welcoming towards each other while engaging in the downtown environment. 	<ul style="list-style-type: none"> All people that engage with downtown are well-served (customers, clients, residents, tourists, workers, etc.), have equitable access to economic opportunities, and thrive as a result. Downtown Hyannis continues to evolve to support innovation, tourism, and local residents. Increase engagement from community residents and visitors to expand the diversity of viewpoints regarding Main Street development and redevelopment. Accessible services and permanent housing solutions are available for the community's most vulnerable populations.

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
Marketing, Communications, and Engagement	<ul style="list-style-type: none"> • Love. Live. Local. - Active communications campaign on consumer education. • Downtown's brand is not consistent among stakeholders. Off-cape tourists see it as a hub and have a positive perception of Hyannis. Residents typically visit only for one purpose (one business they like) and do not always look at downtown favorably. • Improved communication between town and business network • Opportunity to diversify the voices that participate in planning and development initiatives. • Cape Cod communities can collaborate better on marketing. • Some holding onto JFK image. 	<ul style="list-style-type: none"> • Buy Fresh, Buy Local Cape Cod Program • Live Love Local • The Retail Market Analysis and Positioning Strategy 2019 identified the need to conduct an implementation plan and stakeholder outreach to guide roles that organizations could play and collect a vision from the community. • Town's planning department is staffed with a Marketing Outreach Manager who oversees website and its maintenance, business outreach, and coordinates events. 	<ul style="list-style-type: none"> • Hyannis' 'brand' is widely recognized as a vibrant, walkable, enticing main street hub that is a must-see for visitors and go-to for resident consumers. • Cape residents' perception of Hyannis is transformed into seeing Hyannis as a place to go for retail, restaurants, and activities. • Town planning department has the capacity to conduct business outreach and entrepreneurship assistance including small business outreach, site location sales, business plan development, financial resource education, networking, etc. • Hyannis is the mid-Cape hub for arts and culture.

Arts and Culture

- Beach art connects the community to the environment.
- Artists that do anything other than beach art typically have to leave the Cape to reach customers/clients.
- Village Green offers performance space in summer.
- Community desire for expanded performance arts capacity.
- Goal 5 in the Hyannis TDI Workplan 2020 is to create an incubator for arts and culture that will serve as a cultural hub for the region, establish physical spaces for training and attracting creative individuals, and gain recognition as a cultural destination for area residents and visitors.
- Creative Economy Sector Integration (Cape Cod CEDS 2019 – 2024).
- Grant application for a feasibility of an arts and culture incubator submitted Summer 2021.
- Advocate for a new performing arts center within walking distance (Retail Market Analysis and Positioning Strategy 2019).
- Develop arts and culture trails (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010).
- Expand public arts program (Hyannis Harbor Land Use Analysis and Economic Development Strategy 2010).
- The Town's Arts and Culture Coordinator supports the creative community in the entire Town through grant writing, programming, events, and projects including improved wayfinding, expansion of the Hy-Arts campus, etc.
- Collaboration with existing businesses downtown to host gallery and studio space.
- Reinvestment and attraction to the proposed new performing arts center To accommodate a wide array of events including local performers, artists, and musicians.
- Connect arts and culture to economic development initiatives.
- An arts and culture incubator enhances the arts ecosystem within Hyannis.

Vibrant Downtown Elements	Existing Conditions (status quo)	Projects & Initiatives Planned or Underway (short-term, 'level up')	Future Vision (emerging and desired future)
Regulatory/ Government Role	<ul style="list-style-type: none"> • Town Revised Zoning. • Local government is passionate about town and economic development. 	<ul style="list-style-type: none"> • Zoning Tool Analysis to increase public access and understanding of local regulations through continued implementation of online tools such as Open Counter (Cape Cod CEDS 2019 – 2024). • Have the Hyannis Main Street BID develop start-up guides for different kinds of retail businesses (Retail Market Analysis and Positioning Strategy 2019). • Improve Hyannis Main Street Bid's web portal (Retail Market Analysis and Positioning Strategy 2019). 	<ul style="list-style-type: none"> • Positioning strategy is updated on a periodic basis (Retail Market Analysis and Positioning Strategy 2019).

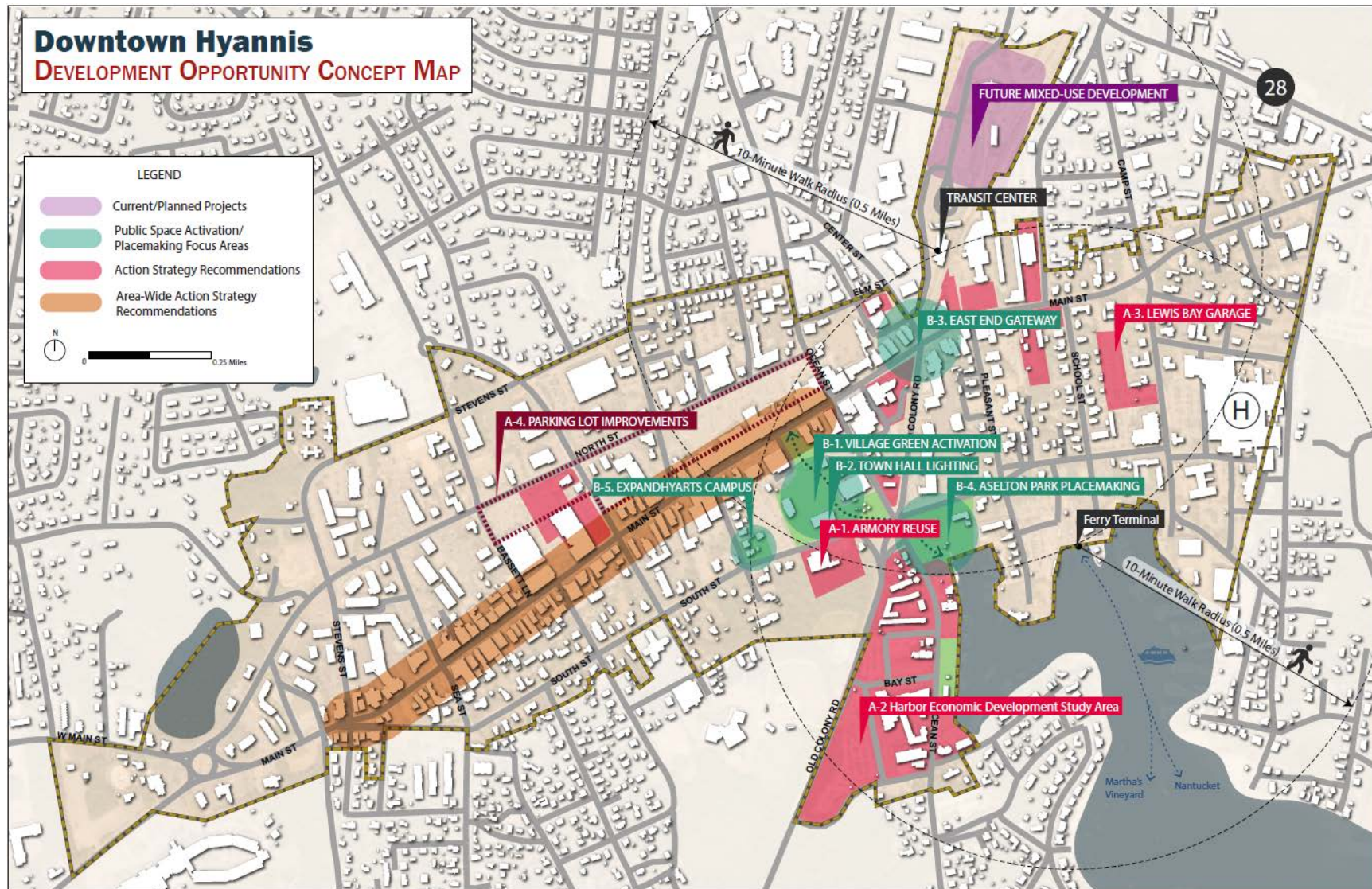
ILLUSTRATIVE VISION FOR DOWNTOWN HYANNIS

The Illustrative Vision for Hyannis includes a Downtown Opportunity Concept Map, Opportunity Sites Map, and Redevelopment Concept for the 200 Main Street property. Together, the Illustrative Vision and desired future narrative above can help implementation partners and the greater Hyannis community understand and engage with the vision for Downtown Hyannis from different perspectives.

DOWNTOWN OPPORTUNITY CONCEPT MAP

The Illustrative Downtown Opportunity Concept Map is shown below graphically and represents the connection between existing conditions and desired future for Downtown Hyannis.

The plan depicts current and planned projects (purple), focus areas for public space activation and place making recommendations from complementary reports (green), opportunity sites identified as part of this planning process (red), and the central Main Street corridor (orange). A ten-minute walking radius was drawn from both the Transit Center and the Ferry Terminal to illustrates that visitors arriving by bus or ferry can easily walk to many points along the eastern end of the study area, which is where most of the projects and initiatives are concentrated.

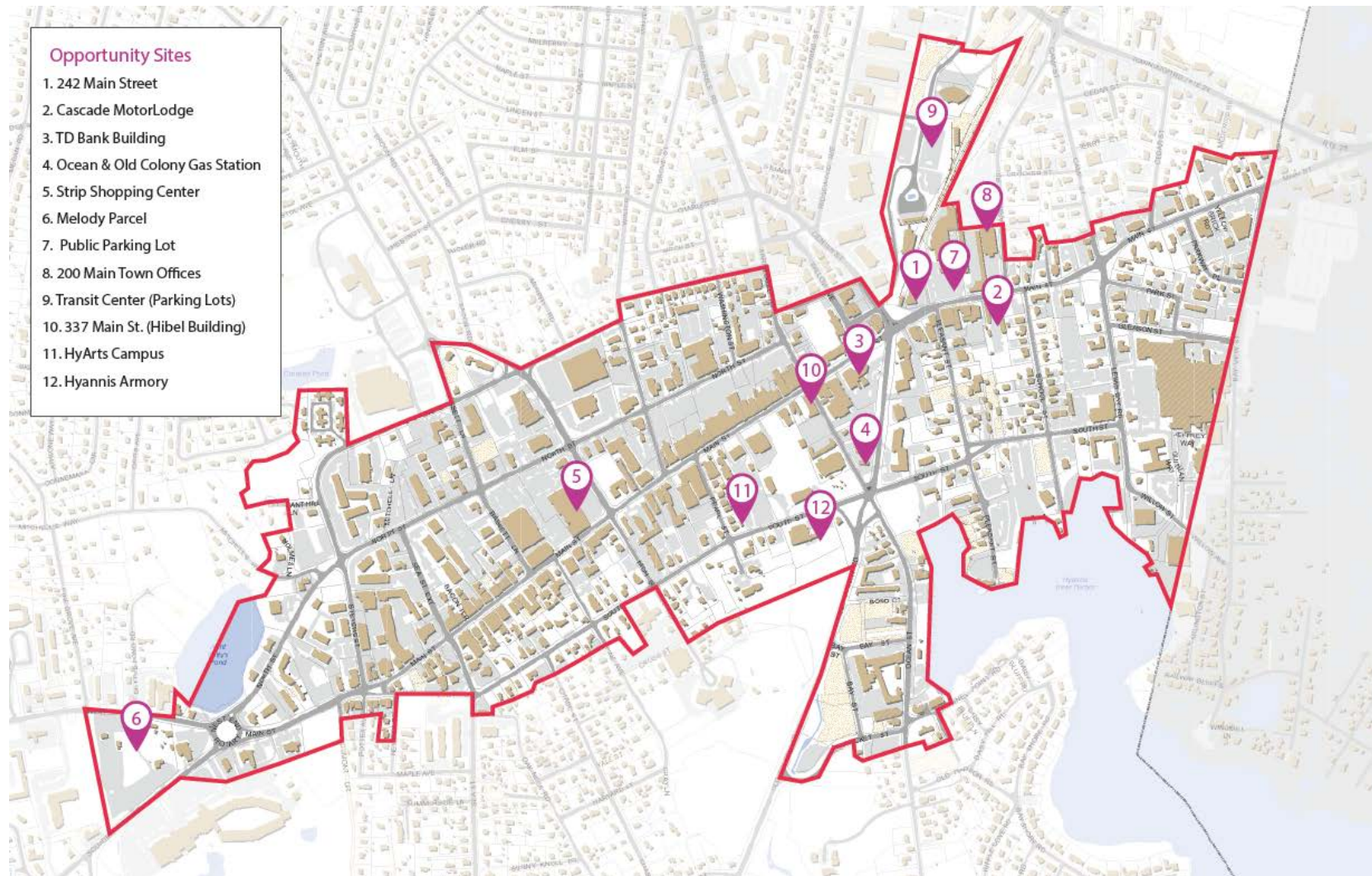


OPPORTUNITY SITES

As part of this exercise, several Opportunity Sites were identified for potential redevelopment. Generally, these sites present infill or redevelopment opportunities to bring in more commercial and residential opportunities to Downtown Hyannis.

1. 242 Main Street
2. Cascade MotorLodge
3. TD Bank Building
4. Ocean & Old Colony Gas Station
5. Strip Shopping Center
6. Melody Parcel
7. Public Parking Lot
8. 200 Main Town Offices
9. Transit Center Parking Lots
10. 337 Main St. Haibel Building
11. HyArts Campus
12. Hyannis Armory

These Opportunity Sites need to be developed or redeveloped based on the highest and best use for each parcel and the downtown ecosystem in Hyannis. Development opportunities will need to consider use type, access to parking, walkability, aesthetics, etc. to create a cohesive environment for residents and visitors. The goal for all proposed projects is to bring value to downtown Hyannis and nearby businesses and properties.



CATALYST SITE: REDEVELOPMENT CONCEPT FOR 200 MAIN

The redevelopment of the property at 200 Main Street is an opportunity to redevelop the property in a manner consistent with the vision for the downtown area as a vibrant and walkable district.

The current property features an expansive surface parking lot between the office building and Main Street. The concept profile presents a vision for redevelopment with a mixed-use building, potentially with ground-floor retail/restaurant/commercial space with residential units above.

In this concept plan, the building provides approximately 42,000 total square feet of space, which could accommodate approximately 10,000 SF of active ground floor uses and 30 multi-family units on the upper floors. The building is not set back from the road, which provides a pedestrian-friendly, human-scale Main Street environment.

The horseshoe shape of the building and corner cut create an inviting transitional gateway between the adjacent residential neighborhood and downtown.

Parking is provided behind the building and is screened by a landscape buffer. As shown, the concept plan provides one additional parking spot than what is currently available on the property.



DEVELOPMENT CONCEPT ILLUSTRATIVE IMAGES



Google Earth
JCRP
HB NITKIN
REAL ESTATE INVESTMENT • DEVELOPMENT • MANAGEMENT

GLASTONBURY
EXTERIOR RENDERING - MAIN STREET

These images are examples for the type of building envisioned in the concept for 200 Main.

Top left: Example of a mixed-use building with similar style to current Hyannis buildings. Image source: HB Nitkin

Bottom left: Example of three-story mixed-use building with courtyard along street. Image source: Hartford Business

Bottom right: Example of four-story mixed-use building with fourth-story setback. Image source: MaineBiz/Courtesy of Town of Yarmouth



ACTION PLAN

The following Action Plan Matrix is a detailed, actionable strategy for attaining the vision for Downtown Hyannis. As the downtown evolves and related conditions and economic drivers shift, the vision for downtown may also evolve, resulting in future modifications to this plan. The Action Plan Matrix includes a prioritized list of actions and strategies needed to successfully implement the Downtown Hyannis Action Strategy. The matrix will be referred to and refined frequently as projects and initiatives are implemented and new actions emerge.

Throughout this strategic planning process, the Town of Barnstable, MassDevelopment, and Camoin Associates engaged several key stakeholders to gain a better understanding of how local and regional partners can work together to support successful projects and initiatives. The Town of Barnstable and MassDevelopment are far from alone when working to enhance Downtown Hyannis and therefore this Action Plan Matrix includes several stakeholders as partners in furthering action strategies.

ATTACHMENT A: STAKEHOLDER INTERVIEWS

The Downtown Hyannis Action Strategy was made possible through the generous contribution of professionals in the community that provided their time, energy, and feedback. As part of the process, Camoin conducted virtual interviews to understand the opportunities and challenges impacting economic development in Hyannis and Cape Cod. We thank the following individuals for their help and input during this process:

- Ali Maloney, AMG Realty
- Amanda Converse, Love, Live, Local
- Anastaci Pacella, The Cordial Eye
- Betsy Young, Soho Arts Co
- Christin Marshall, EForAll
- Deb Krau, Hyannis Civic Association
- Elizabeth Wurfain, Downtown Hyannis BID
- Felicia Penn, Life long resident and former Planning Board Member
- Jake Dewey, Dewey Properties
- Jane Walsh, Red Fish Blue Fish
- Jennifer Clinton, Cape Cod Commission
- Mary-Ann Agresti, The Design Eye
- Mike Lauf, Cape Cod Hospital
- Murray Scudder, HyLine
- Phillip Scudder, Hyline
- Rob Brennan, CapeBuilt
- Steven Johnston, Open Cape
- Tara Vargas Wallace, Amplify POC
- Tom Cahir, CCRTA
- Wayne Kurker, Hyannis Marina

ATTACHMENT B: SURVEY RESULTS

Responses

Camoin, the Town of Barnstable, and MassDevelopment conducted a survey to obtain the community's input on economic development challenges, opportunities, and potential projects for the future of Downtown Hyannis. The survey was distributed digitally via email by the Town of Barnstable and MassDevelopment during May 2021. A total of 354 responses were collected and analyzed as part of the Downtown Hyannis Action Strategy Survey from May 10, 2021, to May 21, 2021. Of those respondents, 225 completed the survey in its entirety.

Perceptions of Current Downtown Hyannis

Respondents were asked, "When you think about the downtown today, what three words come to mind?" In total 285 respondents provided input that highlighted positive and negative attributes and perceptions.

Positive perspectives noted downtown's potential, liveliness, interesting character, and improvements.

- Restaurants and food were mentioned 50 times (18% of respondents).
- Shops and shopping were mentioned 37 times (13% of respondents).
- Parking was mentioned 24 times (8% of respondents).
- Potential was mentioned 23 times (8% of respondents).
- Tourists and tourism were mentioned 20 times (7% of respondents).

Conversely, negative perceptions include that downtown is boring, lackluster, outdated, and expensive/overpriced. Negative attributes noted include vacant, litter/trash, traffic, and homeless.

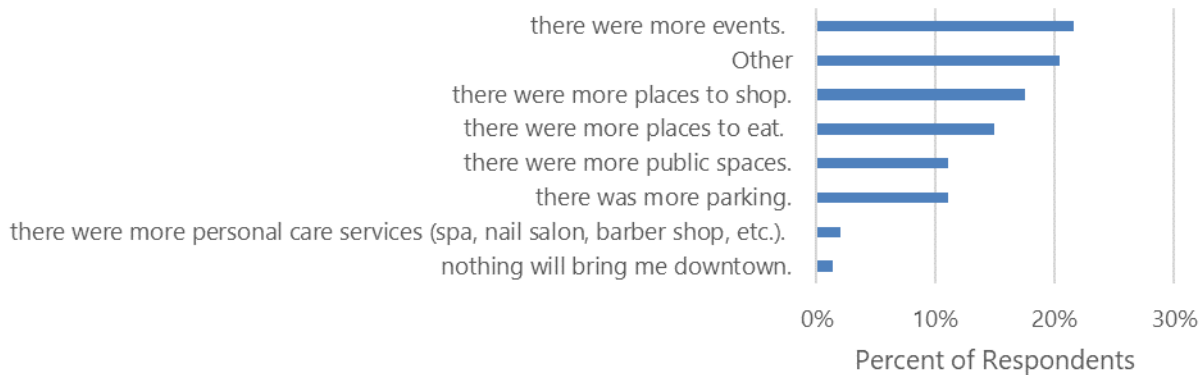
- The term homeless, homelessness, and other related terms were mentioned 68 times (24% of respondents).
- Traffic was mentioned 24 times (8% of respondents).
- 20 people included the term drugs (7% of respondents).
- Old, including old fashioned, was mentioned 12 times (4% of respondents).
- Empty including empty storefronts and restaurants were mentioned 10 times (4% of respondents).
- Rundown was mentioned 10 times (4% of respondents).

What Would Draw People to Downtown

To understand what types of projects and initiatives could motivate residents and visitors to spend time downtown, we asked respondents what types of offerings would draw them downtown. The top response among the 490 respondents was events at 22%. Approximately 20% provided other examples which also were cross-referenced in other categories. These included more/free/easier parking, additional places to eat (coffee shop, fine dining, ethnic food etc), quality retail options, better appearance, and specific events examples such as a farmers market and outdoor events. Other comments focused on homeless and health services, highlighted the need for housing options downtown, and expressed the desire for open spaces and shops for people to hang out.

Other top offerings that would make residents and visitors spend more time downtown include more places to shop (18%), more places to eat (15%), more public spaces (11%), and more parking (11%).

I would spend more time in Downtown Hyannis if...



What Excites People About the Future of Downtown Hyannis

In total, 203 people indicated what excited them about the future of Downtown Hyannis. The following selected quotes are a few responses detailed in this section. Many respondents indicated that the time is now for improvements to Downtown Hyannis. There is a strong desire to have Downtown Hyannis be a destination through infill of vacant properties, adding housing, additional food and retail options, and enhancing street and safety through improvements. The desire for affordable year round housing, second story housing, workforce housing, housing for families, and residents living in a walkable environment was mentioned numerous times. Broadband and other infrastructure were noted to assist in attracting both residents and businesses. Aesthetically respondents indicated that the downtown needs an overhaul through façade improvements, pedestrian-friendly amenities, additional parking, artist space, community events, and greater connection to the waterfront. There is also a desire to include new offerings in the market including coworking spaces, ethnic food, pop up shops, food trucks, farmers' market, and gay clubs.

What excites you about the future of Downtown Hyannis?

“
I hope that above retail and restaurants AFFORDABLE HOUSING/condos/apartments/townhouses can be available to LOCAL people employed on cape.
”

“
The proximity to the water and major employers is a tantalizing prospect for downtown Hyannis if it could ever make it truly walkable and not have islands of nothingness in between interesting / vibrant areas.
”

“
I like the idea of new and old. Tho don't lose the old! It keeps that cape charm.
”

What Concerns People About the Future of Downtown Hyannis

In total, 247 respondents provided input on concerns for the future of Downtown Hyannis. Overall, there is a large concern surround the homeless downtown. The term homeless was indicated in 29 responses while homelessness was mentioned in an additional 10 responses. Drugs, crime, and safety were also indicated in several responses often tied to the concern of downtown becoming rundown. Gentrification and rising costs across the Cape is also a top concern.

Low family and youth retention is a concern among respondents. This is tied to concerns of quality jobs in the area. It was noted that jobs within the tourism economy often have low wages and little benefits making it not sustainable for families. The quality of the retail options downtown was mentioned in several responses. Tourist t-shirt shops and tobacco stores were among those indicated as concerning.

The aesthetics of downtown is a concern, as well as an opportunity. Respondents indicated that if the look of downtown does not change, they believe the area will not thrive and vacancies will persist. Other concerns are focused on overdevelopment and development without a unified vision.

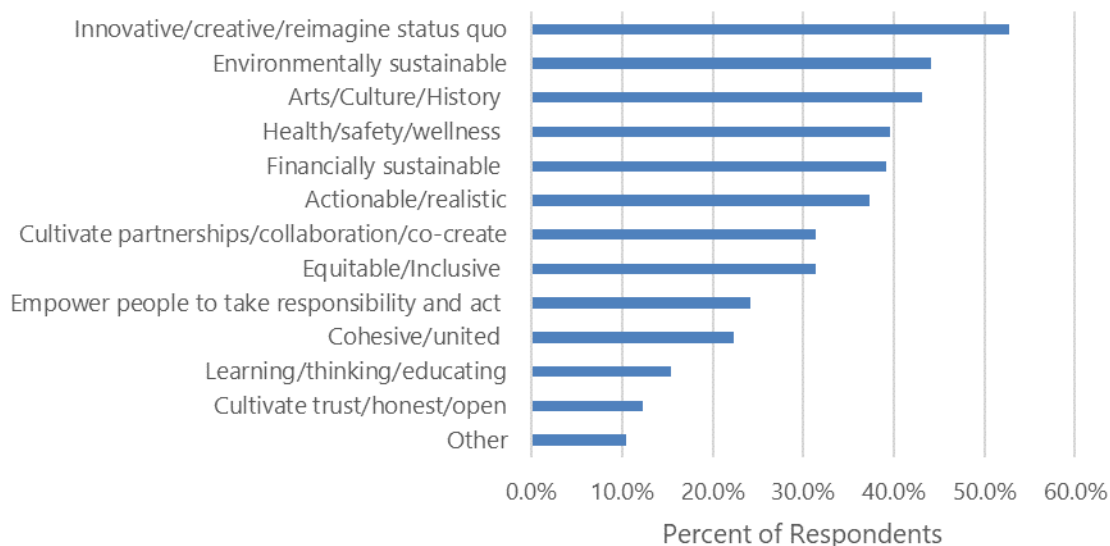
What concerns you about the future of Downtown Hyannis?

“ The price of real estate is driving local businesses out of the area. Soon, downtown will be filled with corporate stores and restaurants. ”	“ My concern is that more and more money will be poured into revitalization without a desired result... I continue to believe that the problem is a lack of a consistent vision, a cohesive sense of definition - what do you want Hyannis to be, what do you want it to look like, who do you want it to serve primarily. ”	“ If the look doesn't change, the downtown area will be nothing and deserted. ”
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Guiding Principles for Strategies

Respondents were asked to select up to five guiding principles that should be established for the Downtown Hyannis Action Strategy. The top principle was Innovate/creative/reimagine status quo with nearly 53% of the 220 respondents. Environmentally sustainable (44%), arts/culture/history (43%), and health/safety/wellness (40%) were also leading guiding principles. These results correspond to many of the respondents' feedback throughout the survey which indicates a strong sense of community pride and desire for downtown to change for the future.

What guiding principles should we establish for the Downtown Hyannis Action Strategy?

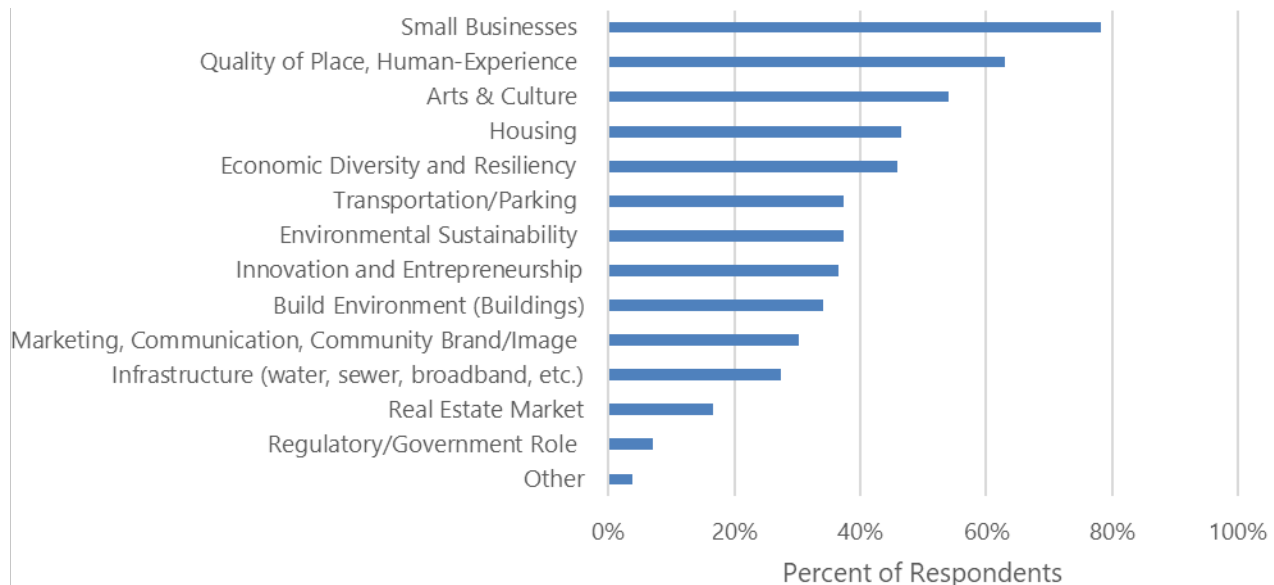


Investment Opportunities

Survey respondents were asked to put their investor hats on and, "Imagine you had \$10 million to invest in Downtown Hyannis to catalyze economic development. You can spend it without restrictions. Answer the following to describe how you would invest your newfound wealth: What project(s) would you invest in? Why would you spend it this way? What are the intended outcomes of your projects? Who would benefit?"

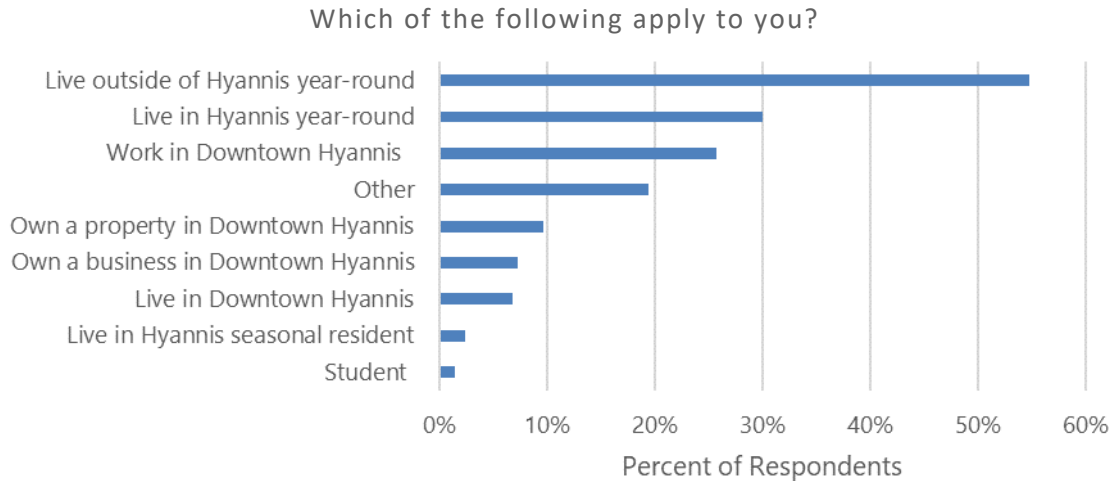
Overall, the 78 investment opportunities included as part of the survey presented a resident-centric approach to economic development rather than focusing on the tourist base. There is a strong desire to allow people to interact with downtown and for people to live and work within the downtown environment. The top investment opportunities were centered around housing, infill of vacant buildings and storefronts, parking, and façade improvements updates. Other investment opportunities including retail/marketplace options (coffee shop, bakery, bar, takeout, entertainment space, etc); transportation infrastructure and bus system improvements, enhanced social service, wastewater and broadband infrastructure investments, entertainment options, and a renovation on Main Street to redirect traffic.

Respondents were then asked to provide feedback on which framework items their project would support. In total 211, respondents selected framework options which outnumbered the project responses. Therefore, some respondents provided feedback on projects that were not gathered as part of this survey. The top framework was small businesses with 78% of respondents followed by quality of place, human experience with 63%, arts and culture 46%, and housing 46%.

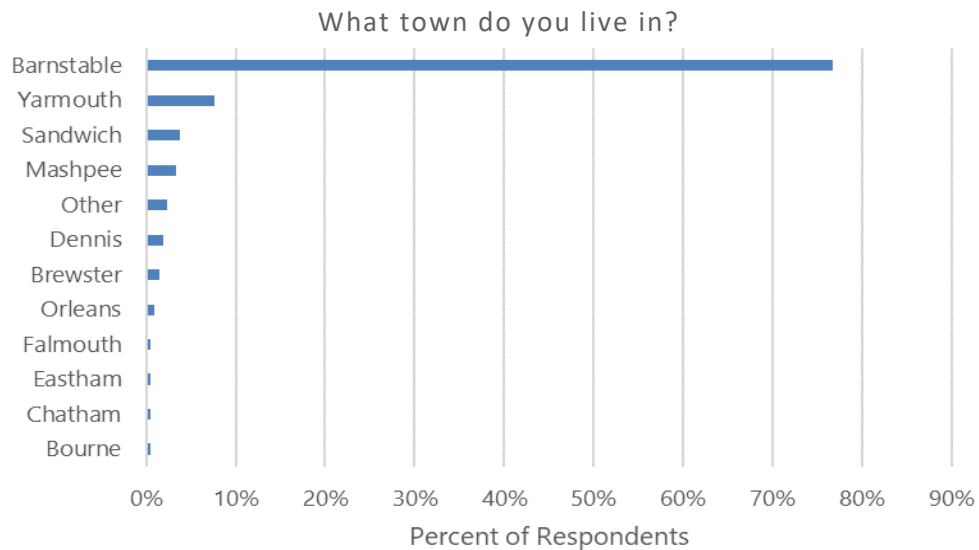


Respondent Demographics

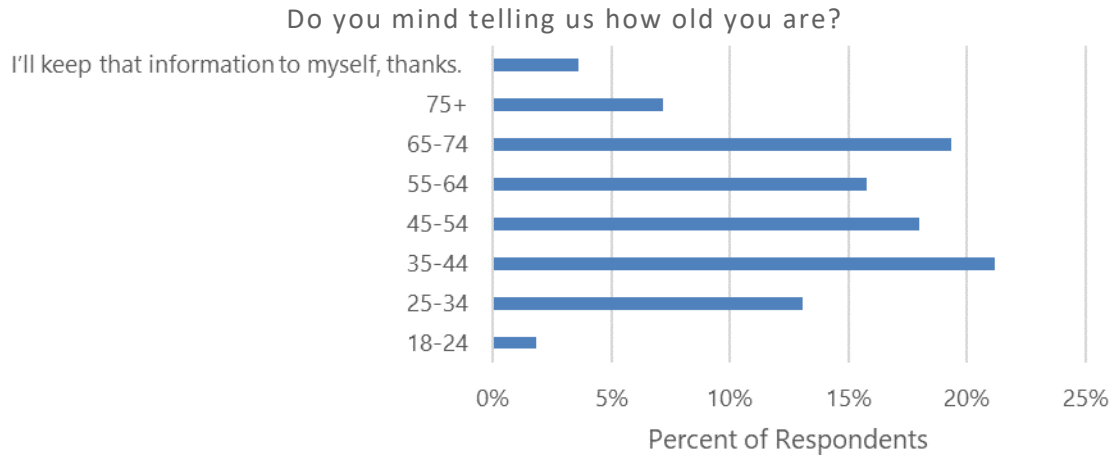
Survey respondents were asked to indicate which of the following relationships to Hyannis apply to them. Of the 206 respondents that answered this question, 55% indicated they live outside of Hyannis year round while 30% indicated they live in Hyannis year-round. Hyannis workers, property owners, and business owners, downtown residents, and seasonal residents were also captured in the survey.



211 survey respondents indicated which town they live in. Approximately 77% of these respondents live within the Town of Barnstable. Other top surveyed towns of residency include Yarmouth (8%), Sandwich (4%), and Mashpee (3%).



Survey respondents spanned all age ranges. Of the 222, respondents that answered the question 21% are 35 to 44 years old, 19% are 65 to 74 years old, and 18% are 45 to 54 years old. The younger generation age 18 to 24 was the least represented group with 2% of all respondents.



ATTACHMENT C: WORKSHOP

ATTENDEES

As part of the Downtown Hyannis Action Strategy, Camoin Associates hosted an internal workshop to coalesce ongoing efforts and catalyze that momentum within a focused, actionable strategy for downtown that will function as an implementation roadmap for Hyannis to cement itself as a resilient year-round community in the heart of Cape Cod. This workshop focused on the goals and strategies within the action plan matrix to gauge momentum for implementation.

We thank the following individuals for their help and input during this process:

- Amanda Converse, Love, Live, Local
- Anabelle Rondon, MassDevelopment
- Anastaci Pacella, The Cordial Eye
- Elizabeth Jenkins, Town of Barnstable
- Elizabeth Wurfbain, Downtown Hyannis BID
- George Durante, MassDevelopment
- Gloria McPherson, Town of Barnstable
- Jay Pateakos, MassDevelopment
- Julie Wake, Arts Foundation of Cape Cod
- Kate Maldonado, Town of Barnstable
- Mary Ellen DeFrais, MassDevelopment

ATTACHMENT D: DATA SOURCES

COSTAR

CoStar is the leading source of commercial real estate intelligence in the U.S. It provides a full market inventory of properties and spaces—available as well as fully leased—by market and submarket. Details on vacancy, absorption, lease rates, inventory, and other real estate market data are provided, as well as property-specific information including photos and floor plans. CoStar covers office, retail, industrial, and multifamily markets. CoStar data is researched and verified by the industry's largest professional research team. With 1,200 researchers and 130 field research vehicles, CoStar's team makes calls to property managers; reviews court filings, tax assessor records and deeds; visits construction sites; and scans the web to uncover nearly real-time market changes. More at www.costar.com.

ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (Emsi), a proprietary data provider that aggregates economic data from approximately 90 sources. Emsi industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on Emsi, please see www.economicmodeling.com). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

ESRI BUSINESS ANALYST ONLINE (BAO)

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract businesses that fit their community. For more information, visit www.esri.com.



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Camoin Associates
PO Box 3547
Saratoga Springs, NY 12866
518.899.2608
www.camoinassociates.com
@camoinassociate

