Assembly of Delegates Briefing
Planning for healthy resilient Cape Cod communities
anticipating and guiding housing needs
215,000 PEOPLE
162,000 HOUSING UNITS
96,000 EMPLOYER JOBS
85% LAND PROTECTED OR DEVELOPED
Housing Market Analysis released earlier this year by the Cape Cod Commission highlights a number of challenges as it relates to housing supply and demand in the next 10 years (and beyond).
Demographic and Economic Forecast

3.3% population growth
Population is projected to grow to a total of 221,000 over the forecast period.

5.5% increase in employment
National, regional and local economic factors combine with projected population increases for this forecasted growth to a total of 155,700.

3.4% increase in households
Growth is slightly faster than population since household size is projected to decrease.
Shifting Demand

Demand for seasonal homes will persist as a major driver of housing unit demand.

The impacts of the Great Recession caused a surge in second home demand. This will have a long lasting effect on Cape Cod’s housing market.
We lack diversity in the types of homes available to the market

<table>
<thead>
<tr>
<th>Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-UNIT, DETACHED</td>
<td>82%</td>
</tr>
<tr>
<td>1-UNIT, ATTACHED</td>
<td>3%</td>
</tr>
<tr>
<td>2 UNITS</td>
<td>3%</td>
</tr>
<tr>
<td>3 OR 4 UNITS</td>
<td>4%</td>
</tr>
<tr>
<td>5 TO 9 UNITS</td>
<td>2%</td>
</tr>
<tr>
<td>10 TO 19 UNITS</td>
<td>2%</td>
</tr>
<tr>
<td>20 OR MORE UNITS</td>
<td>3%</td>
</tr>
<tr>
<td>MOBILE HOME</td>
<td>1%</td>
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We have lower share of year-round rental properties.
Change in Cumulative Affordability Gap by Income Level for Owners in Barnstable County, 2015-2025

Number of Housing Units (Owned)
www.capecodcommission.org/housingstudy
CEDS

Types of Resiliency

Community

Economic

Environmental
Employment growth is expected to add roughly **6,200 additional residents by 2025**.
26,000 households on Cape Cod are ‘cost burdened’ spending more than 30% of income on housing.

Source: CRANE/EPR, Barnstable County Housing Market Analysis
Consequence of Sprawl

2,300 ACRES OF TREE COVER LOST
COASTAL HOMES AT RISK

ESTIMATED ECONOMIC LOSS

PROPERTY VALUE: $9,000,000,000

13,000 SINGLE FAMILY HOMES IN SPECIAL FLOOD HAZARD AREAS (SFHA)

FEMA SFHA
RESIDENCES IN SFHA
7,258 Acres Potentially Developable in Special Flood Hazard Areas on Cape Cod

Percentage of Each Town’s Potentially Developable Land in Special Flood Hazard Areas:

- Orleans*: 38%
- Sandwich*: 29%
- Chatham: 22%
- Wellfleet: 21%
- Brewster: 15%
- Bourne: 14%
- Eastham: 20%
- Dennis: 11%
- Falmouth: 11%
- Harwich: 9%
- Truro: 8%
- Barnstable: 7%
- Mashpee: 4%
- Yarmouth: 3%
- Provincetown: 1%
Vision for the Future

Protect the region’s natural resources to provide vital ecosystems services

Focus economic revitalization in existing centers of activity
## REGIONAL ACTIVITY CENTERS

<table>
<thead>
<tr>
<th>Factors</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>1 factor</td>
<td>Transform</td>
</tr>
<tr>
<td>2 factors</td>
<td>Evolve</td>
</tr>
<tr>
<td>3 factors</td>
<td>Maintain</td>
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**DOWNTOWN FALMOUTH**
Place Based Planning

- Activity Centers focus of infrastructure planning/funding
- Commission support for planning/design
- Adoption of Zoning/Regulation to support mixed-use/housing
- Reimagined commercial & industrial areas
Community Resiliency by Design Workshops

Eastham, Orleans, Falmouth, Barnstable
• June 19th and 20th
OneCape - August 17, 2018
Housing Preference Survey

Fall Workshops
Builders Roundtable
Form Based Code Framework

Funded by the
Executive Office of Energy and the Environment
Creative Approaches to Moderate Density

Filling the Missing Middle on Cape Cod

First Public Presentation
Falmouth
June 20, 2018
Some principles of healthy communities

• Walkable and pedestrian friendly
• Mix of housing types that meets the broad needs of the community
• Public & private outdoor spaces and amenities
• Contextual architectural design and materials
• Equitable connection and access to community resources and amenities
Our passion for community design stems from our belief that many time-tested principles for creating healthy places have been largely forgotten over the past 50 years.
And that the design of new public places, neighborhoods and buildings must resonate with the communities they serve and enhance our civic life.
And that through careful application of the principles of healthy neighborhood design, we can provide a **framework for revitalizing our streets and neighborhoods.**
Why are we here?

To **begin** community conversations around strategies and techniques for **meeting the increasing demand for housing** on cape cod...
Where we are starting

Each community has recently completed studies that identify areas where new housing types would be appropriate.

Eastham and Orleans have also adopted recent zoning changes that provide new opportunities for housing and mixed use development.
Where we are starting

The study areas focus on the “main street” areas or commercial core of each community – the “transitional” areas at the edge of the single family districts...

Eastham: Route 6 / Brackett Rd Area

Orleans: Village Center

Falmouth: Davis Straits Area
What do we hope to deliver?

To develop a series of moderate density prototypes – based on local precedent and community input...

...that could be used to address housing challenges in variety of places on the Cape and in each community.
What do we hope to deliver?

Develop the framework (starting point) for form based regulations to assist your town boards as they review new development proposals.

To help guide new development in ways that support the character of your community.
What do we hope to deliver?

Share our initial findings during the One Cape Summit this August

As well as a final series of public meetings and workshops in the fall to review specific recommendations and regulatory goals for each community.
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