Rapid Recovery Plan

2021

Downtown Hyannis / Barnstable

dhcd Massachusetts

RAPID RECOVERY PLANS

This plan has been made possible with generous support from the Commonwealth of Massachusetts.

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The Department of Housing and Community Development, through its community and business partners, provides affordable housing options, financial assistance, and other support to Massachusetts communities. We oversee different types of assistance and funding for consumers, businesses, and non-profit partners.

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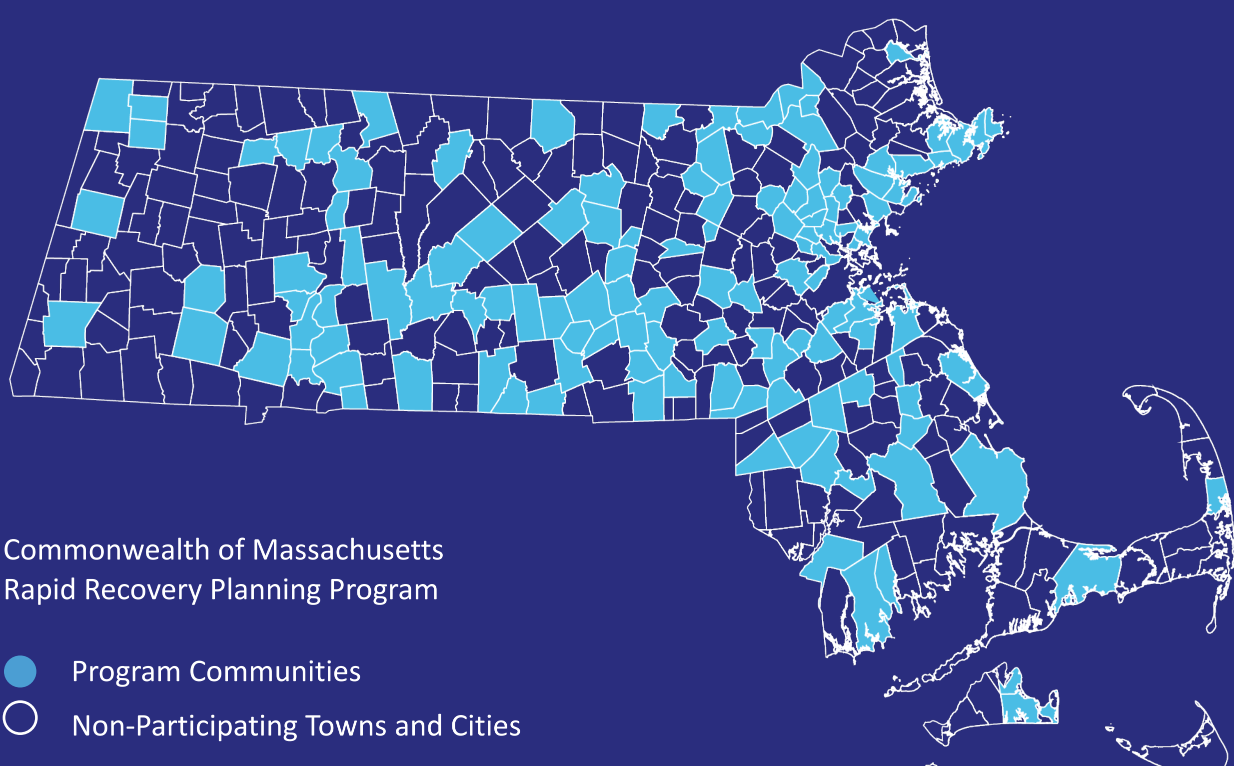
Appendix 68

125 communities participated in the Rapid Recovery Plan Program

52 Small Communities
51 Medium Communities
16 Large Communities
6 Extra Large Communities

Mass Downtown Initiative distributed nearly $10 million across 125 communities throughout the Commonwealth to assess impacts from COVID-19 and develop actionable, project-based recovery plans tailored to the unique economic challenges in downtowns, town centers, and commercial districts.



Commonwealth of Massachusetts
Rapid Recovery Planning Program

- Program Communities
- Non-Participating Towns and Cities

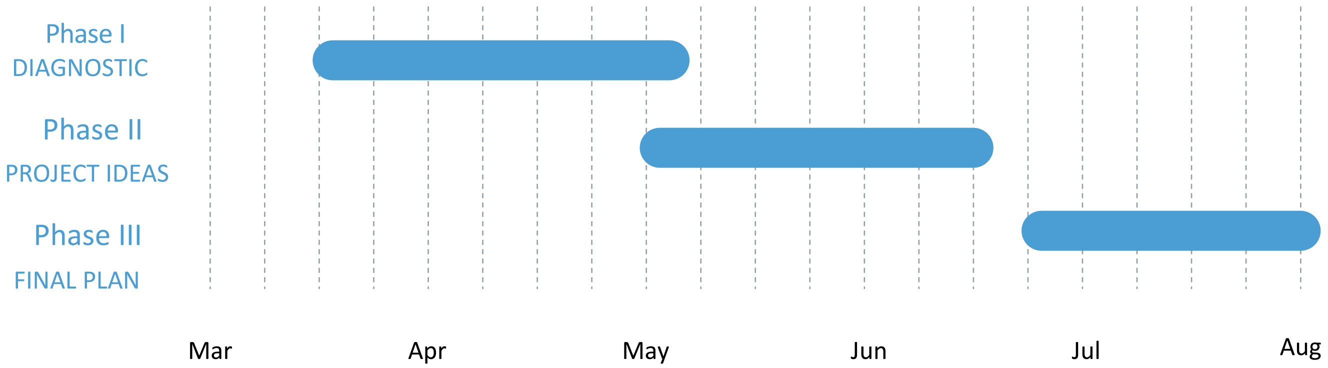
Rapid Recovery Plan (RRP) Program

The Rapid Recovery Plan (RRP) Program is intended to provide every municipality in Massachusetts the opportunity to develop actionable, project-based recovery plans tailored to the unique economic challenges and COVID-19 related impacts to downtowns, town centers, and commercial areas across the commonwealth.

The program provided technical assistance through Plan Facilitators assigned to each community applicant (e.g., city, town, or nonprofit entity) and Subject Matter Experts who supported the development of ideas for project recommendations and shared knowledge through best practice webinars and individual consultations.

Communities and Plan Facilitators were partnered through the program to assess COVID-19 impacts, convene community partners to solicit project ideas and provide feedback, and develop project recommendations. The following plan summarizes key findings from the diagnostic phase of the program and includes a range of priority project recommendations for the community.

Each Rapid Recovery Plan was developed across three phases between February-August 2021. Phase 1 - Diagnostic, Phase 2- Project Recommendations, Phase 3 - Plan.



In Phase 1: Diagnostic, Plan Facilitators utilized the Rapid Recovery Plan Diagnostic Framework that was adapted from the award-winning Commercial DNA approach as published by the Local Initiative Support Corporation (LISC) in “Preparing a Commercial District Diagnostic”, and authored by Larisa Ortiz, Managing Director, Streetsense (RRP Program Advisor).

The framework was designed to ensure methodical diagnosis of challenges and opportunities in each community, and to identify strategies and projects that aligned with the interests and priorities of each community. The framework looks at four areas of analysis: Physical Environment, Business Environment, Market Information, and Administrative Capacity - each equipped with guiding questions to direct research conducted by Plan Facilitators.

Rapid Recovery Plan Diagnostic Framework

Who are the customers of businesses in the Study Area?

How conducive is the physical environment to meeting the needs and expectations of both businesses and customers?

What are the impacts of COVID-19 on businesses in the Study Area? How well does the business mix meet the needs of various customer groups?

Who are the key stewards of the Study Area? Are they adequately staffed and resourced to support implementation of projects? Are the regulatory, zoning, and permitting processes an impediment to business activity?

Following the diagnostic in Phase 1, Plan Facilitators, in close coordination with communities, developed and refined a set of recommendations that address priority challenges and opportunities. These project recommendations are organized in clear and concise rubrics created specially for the Rapid Recovery Plan Program. Project recommendations are rooted in a set of essential and comprehensive improvements across six categories: Public Realm, Private Realm, Revenue and Sales, Administrative Capacity, Tenant Mix, Cultural/Arts & Others.

Public Realm | Private Realm | Tenant Mix | Revenue/Sales | Admin Capacity | Cultural/Arts | Other

Executive Summary

Executive Summary

All things considered, Downtown Hyannis has proven resilient amidst the COVID-19 pandemic

Many of us in the Downtown place-management industry were understandably concerned in March 2020. Not just about the onset of a global pandemic, but also, the cataclysmic effect that it would have on – indeed, the existential threat that it posed to -- Downtown and Main Street districts across the country that were grounded in the experiential economy, fueled by discretionary spending, filled with small businesses and, in many cases, dependent on consumer submarkets that had effectively disappeared overnight.

As it turned out, the impacts varied widely. Big-city CBD's like Boston's continue to struggle today with greatly reduced levels of foot traffic, while vacation and second-home markets have benefitted, at least temporarily, from an influx of remote-working urban dwellers. Fly-in tourist destinations faced prolonged stretches of dormancy while drive-in tourist attractions near outdoor-recreational draws were inundated with tourists. And counterintuitively, districts known for large national brands have tended to lose more tenants than ones in which independents predominate.

Downtown Hyannis has been relatively well-positioned for all of this: it is a drive-in vacation destination (abounding in opportunities for outdoor recreation) and second-home address for two major metropolitan areas that had been hit extremely hard in the pandemic's first wave. And it was fortunate from a timing perspective, with a sharp drop-off in COVID-19 cases during the summer 2020 peak season (and the first half of summer 2021).

Of course, Massachusetts contains a number of other Downtowns that were similarly situated, yet Downtown Hyannis performed even better than other LRRP communities (see table below). Its percentages might be skewed, though, by its much lower percentage of respondents in the "food service / accommodation" category, which was disproportionately impacted in the pandemic's early months.

	Downtown Hyannis	Commonwealth of Massachusetts
Revenue Loss in 2020 (y-o-y)	64%	68%
Revenue Loss of 25%+ in 2020 (y-o-y)	41%	46%
Store Traffic Loss in Jan/Feb '21 (y-o-y)	**46%**	**65%**
Store Traffic Loss of 25%+ in Jan/Feb '21 (y-o-y)	**39%**	**49%**
Employee Layoffs	**28%**	**38%**
Reduced Operating Hours / Capacity	**62%**	**72%**
Increased Revenue in 3 Years Prior to COVID-19	55%	57%
% Food Service / Accommodation	8%	21%
% Retail	30%	23%
% Arts / Entertainment / Recreation / Fitness	28%	9%

All things considered, Downtown Hyannis has proven resilient amidst the COVID-19 pandemic

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This story, however, is reinforced by anecdotal input. According to stakeholder interviews, a number of merchants – especially in food and beverage -- enjoyed a strong summer 2020.

Furthermore, there were a slew of new businesses that have opened since the start of the pandemic (e.g. Reel Time, 606 Thrift Ave, Bella Cris, Finn's Craft Tap House, Chez Antoine Café, Perry Lima Café, Caribbean Café, etc.) – as well as existing ones that have expanded (e.g. Joke Shop & Adult Connection, Columbo's Cafe).

While eight retailers closed their doors during that time, very few of those failures could be attributed to COVID-19: most were already headed in that direction and/or befallen by personal circumstances. One should also keep in mind that a certain percentage of tenants fail every year even during normal times.

It may be easy to forget now just how dire the circumstances felt in the spring 2020, how grim the forecast. Viewed from that frame of reference, however, the relatively healthy state of Downtown Hyannis today – with just ten vacant storefronts – is quite something.

So how was it possible? Well, a number of common themes have emerged.

Perhaps most importantly, the Federal government provided assistance on a truly massive scale, including, for businesses, the Paycheck Protection Program (PPP) and the Restaurant Revitalization Fund (RRF), and, for consumers, the three rounds of stimulus checks, expanded unemployment benefits, expanded child tax credits, etc.

Many state and municipal governments as well as non-profit partners established their own relief funds. For example, Live Love Local teamed with the Hyannis Main Street BID to raise money for a "Cape Cod Resilience Fund" that distributed direct grants to small businesses.

Businesses adapted to the new circumstances in resourceful ways. 43% of Downtown merchants established alternative means of selling and delivering products. Some tapped online channels to expand their catchments across the region if not beyond. Meanwhile, food and beverage establishments availed themselves of additional space for outdoor dining and drinking as well as loosened restrictions on to-go alcohol sales.

In addition, calls to "shop local" seemed to resonate during the pandemic, according to some proprietors. And finally, most property owners were willing to be patient with their tenants and rework lease terms, with businesses also back-stopped for several months by a statewide eviction moratorium.

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Going forward, however, prospects are mixed

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In the near term, there are doubt some powerful headwinds (e.g. labor shortages, supply-chain bottlenecks and rising supply costs), growing competition for the tourist dollar (as Northeasterners start to venture further afield) and the possibility of "grey swans" (e.g. the emergence of new coronavirus variants).

On a broader structural level, Downtown remains in a good place. Tourists continue to come from far and wide. Even this past summer, 46% of the respondents to our intercept survey hailed from outside Massachusetts. And critically, these visitors help to insulate the district against competitive threats.

Leisure travelers tend to be in a different frame-of-mind than everyday consumers. They are not pressed for time, oriented towards convenience or fixated on price; rather, they are on vacation, guitlessly willing to treat themselves (and/or their kids), primed to spend and ready to buy on impulse. At those moments, they are less vulnerable to the lures of shopping centers or e-commerce.

A visitor enticed by a gift item in a Main Street store is not about to walk to her car, drive to Route 132 and compare it to the alternatives there. And even if she can also find it at home or buy it for cheaper online, she is unlikely to forgo the instant gratification of buying it on the spot. She is, in a sense, "captive" to what is in front of her.

Indeed, 77% of the intercept survey respondents had made a purchase during their visit, with 55% of them purchasing clothing or souvenirs – extremely high percentages amidst the supposedly inexorable rise of e-commerce.

Furthermore, the Cape was perfectly situated to take advantage of the urban flight that took place in 2020, and sitting roughly 1 ½ hours from Boston/Cambridge, it offers a workable arrangement for hybrid workers (to the extent that the trend endures).

Indeed, the net migration of roughly 5,000 people to Barnstable County in 2020 was the fourth-highest *in the country* for metros of more than 50,000 people, according to U.S. Postal Service data on permanent change(s)-of-address. After a 2.9% population decline in the 2000's, the County expanded by 6.1% in the 2010's (to a total of 229,000), with Barnstable Town growing by 8.2% (to 49,000). Full-time occupancy increased significantly in the decade, from 53% to 58%.

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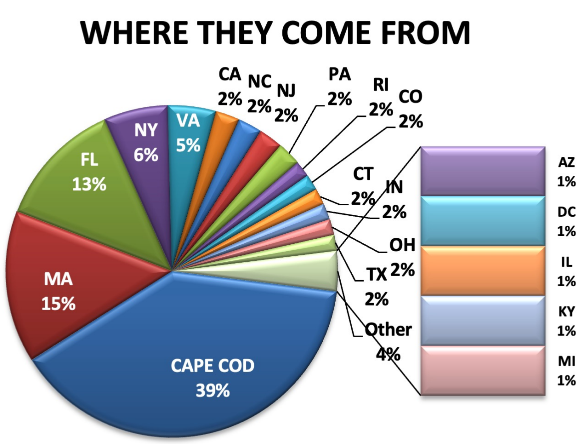

Where People Moved During the Pandemic

Biggest change in net in-migration among U.S. metros over 50,000 population

1. Hudson, New York
2. Kingston, New York
3. Torrington, Connecticut
4. Barnstable Town, Massachusetts
5. Heber, Utah
6. Pittsfield, Massachusetts
7. Lebanon, New Hampshire
8. Panama City, Florida
9. Aberdeen, Washington
10. Naples-Marco Island, Florida

Source: U.S. Postal Service 2019–2020

Going forward, however, prospects are mixed

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These sorts of figures should translate to a larger year-round population that Main Street businesses can theoretically tap. But this is where **the bullishness needs to be tempered**.

Main Street has long struggled to attract year-round residents, for a variety of reasons that will be dissected further in this Plan. These include the formidable nearby competition along Route 132, the undisputed retail hub of Barnstable County; the regional roadway network (which largely bypasses Downtown Hyannis); and the negative perceptions of the district, centering on its social service population but also grounded in tough comparisons to other village centers on the Cape.

Breaking through will only become more challenging in the years ahead, with the arrival of WS Development's "The Landing at Hyannis" lifestyle center, across from the Cape Cod Mall on Route 132. Unlike the other strip malls that exist along that corridor (including the Capetown Plaza that it will replace), The Landing will be positioned and marketed, like the Mall a half-century earlier, as a (sanitized) alternative to the Downtown, complete with a central green for events and programing. It might not capture impulse-driven tourist expenditures, but it will almost certainly appeal to the year-rounders who complain about the inconveniences and rough edges of the traditional core.

Rendering (right) of the central green planned as part of "The Landing at Hyannis", which is being developed by Chestnut Hill, MA-based WS Development, the ones behind Derby Street Shops in Hingham (left), Legacy Place in Dedham as well as Boston's Seaport District

The following Plan will zero in on these specific challenges

The Local Rapid Recovery Plan (LRRP) process is designed to focus on impacts related to the COVID-19 pandemic, and understandably so – the large pot of Federal money provided by the American Rescue Plan Act (ARPA) can only be spent for such purposes.

However, the reality – as explained above – is that the pandemic's impact on Downtown Hyannis has been surprisingly (and thankfully) mild. To the extent that it has been more dramatic, the LRRP process began long after those effects had been most keenly felt, and indeed, addressed.

Businesses had already applied for, and in most cases, received government relief. Shops had established an online presence (if they had not, already). The Town had already expanded the sidewalks and installed the barriers, enabling restaurants to add large amounts of outdoor seating. The stage had been set for recovery. From the worst of the pandemic, at least.

Indeed, while quantitative data on foot traffic along Main Street does not exist, anecdotal evidence from merchants and the experience of analogous Downtowns elsewhere point to the likelihood that summer 2020 was extremely busy, probably even more so than 2019.

And yet, in the case of Downtown Hyannis and so many other main streets, the formidable challenges that existed prior to the arrival of the coronavirus have remained, just as stubborn as ever, still waiting to be addressed.

We have tried to indicate in this Plan where our recommendations would be responding to pandemic-specific impacts, but ultimately those are not the biggest obstacles that prevent Main Street from elevating itself to the next level, from reaching its true potential.

In this respect, we will be revisiting much of what we found and proposed in the retail positioning and tenanting strategy that we developed in concert with the Hyannis Main Street BID and the Town of Barnstable in 2019. Because we did not at that time have the funding to proceed with implementation, and because COVID-19 arrived not long thereafter, the recommendations contained therein largely still apply.

We have provided the written deliverable for the 2019 strategy, an executive-summary memo, in the appendix. And while we have updated its findings and expanded our purview to include a somewhat broader range of issues in this Plan, **we have been able to put a portion of the LRRP budget** – which would have been needed for initial field work – **towards the implementation of four of that strategy's recommendations**.

These include a pedestrian-intercept survey, so as to better understand the peak-season foot traffic, as well as an information-clearinghouse function, district-wide leasing collateral and a tenant-prospecting campaign, the last three of which appear as project sheets in the Plan.

Finally, a word on how this Plan was written…

We have been provided with an excellent framework by the Commonwealth's Department of Housing and Community Development and have largely followed it – an executive summary, followed by key findings and then specific recommendations (taking the form of project sheets) -- but we have also been encouraged to customize it to our unique style.

So what does this mean?

The LRRP process was an extensive one, incorporating rigorous and nuanced analysis of the customer base, the physical environment, administrative capacity and other variables; multiple forms of stakeholder engagement (surveys, community workshops, one-on-one interviews); consideration of case studies and best practices; as well as close collaboration with the client group.

In the write-up of the Plan, we have eschewed rote summaries of this process, opting instead to **work backwards from our ultimate recommendations.** In each case, we put forward narratives of why we identified the problem and how we thought about it, referencing data points only if/when they were relevant for such purposes (with full data-sets provided in the Appendix).

This approach is by design, so that you can more effectively channel our thinking once we leave the scene. We have seen all too often how implementation of well-intentioned and well-conceived strategies can be stopped in their tracks by unrepresentative pushback rooted in ideology, ignorance and/of self-interest. We want to **arm you with the ammunition to fight back**, not because it will convince the most virulently-opposed but rather, so that you might sway the fence-sitters and the decision-makers.

Second, we did not try to be exhaustive in this Plan. While a large number of issues and challenges emerged during the course of this process, we focused on what we felt were the most pressing ones, sensing that we would be able to add more value by **going deep, rather than wide.**

Three, we were hesitant to stray too far from our primary area of expertise. **Retail is what we know, what we love, what we live and breathe**. And for better or for worse, it is the narrow lens through which we see the world. That will undoubtedly come across in what follows.

Four, we are not grant writers. We have made a good-faith effort to identify possible sources of funding that you might explore, but the eligibility criteria for different programs can be quite complicated and additional due diligence will almost certainly be necessary.

Finally, we limit our direction to initial action steps. Especially in the fast-moving space of retail, practical implementation almost never moves in a linear fashion. What we do first often has second and third-order consequences that completely scramble our original assumptions and expectations. There is little value, then, in projecting too far into the future. The best path forward will likely evolve over time, making us wary of getting too prescriptive, too soon.

Diagnostic

Key Findings

PHYSICAL ENVIRONMENT

Downtown's one-way couplet (still) needs to be reconsidered

Main Street's one-way traffic dates to 1957, when it was instituted in response to summer congestion, and 1968, when it was extended year-round. Two-way conversion has been contemplated for at least twenty years yet before the arrival of COVID-19, the corridor was still serving as a fast-moving through street to points west.

Meanwhile, Downtowns across the country have been shifting away from one-way road networks for decades. A 2018 study by the University of San Francisco and San Diego State University, looking at two-way conversion in six districts across the country, points to a correlation with growth in food, beverage and entertainment spending; construction of new housing; and in-migration of higher-income households.

Two-way traffic would ensure greater visibility for Main Street's businesses – not just more cars, but slower-moving ones more likely to look at the individual storefronts -- while offering more intuitive circulation for visitors new to the Downtown. Residents of the more affluent communities to the west and southwest would be exposed to what exists along Main Street and enjoy more direct access to it.

Slower-moving, two-way traffic would also enhance Main Street's walkability as well as its sense of intimacy, asserting once and for all the primacy of Downtown Hyannis' role as a true village center, rather than as a pass-through for regional traffic.

Besides, it is hard to see how such a change would affect through-traffic all that much, given that Route 28 would continue to serve as a westbound bypass, and the simultaneous two-very conversion of South Street would offer yet another alternative.

Finally, it is worth noting that other tourist-driven main streets in the Cape – like Chatham and Falmouth – have long provided for two-way traffic, without apocalyptic results. And Chatham does not appear to offer any "straight-shot" alternative for through-traffic.

For all these reasons, MJB Consulting joined the Urban Land Institute (in its 2013 Boston Technical Assistance Panel), Nelson Nygaard (in its 2017 Hyannis Parking Study) and others to recommend further exploration of two-way conversion in its 2019 Retail Positioning and Tenanting Strategy.

PHYSICAL ENVIRONMENT

The pandemic-era barriers were, on the whole, a success

With the arrival of COVID-19 in the spring of 2020, the Town of Barnstable installed barriers and removed a lane of traffic so as to accommodate more space for outdoor dining and social distancing along Main Street.

Based on anecdotal evidence, the expanded public space was popular with many visitors, who said they felt safer with the reduced speeds and social distancing. This aligns with national data: according to recent surveys by the National Restaurant Association, eight of ten diners are in favor of allowing restaurants to set up tables on/in sidewalks, streets and parking lots *permanently*.

The overwhelming majority of the businesses in Downtown Hyannis were also supportive: just 19% of the respondents to the LRRP survey expressed dissatisfaction with customer and employee access, while 91% wanted *more* opportunities for outdoor dining and selling.

The street barriers nevertheless proved controversial, especially when they were brought back in summer 2021. Some residents grumbled about traffic back-ups, while a small but particularly vocal subset of merchants decried the loss of parking (a claim that is deconstructed elsewhere in the "Key Findings" section).

Other complaints from proprietors focused on the design, which, in a well-intentioned move to ensure social distancing, had the effect of steered pedestrians *away* from the individual shopfronts, undermining efforts to entice them with compelling window displays, a key component of a savvy retailer's marketing efforts.

BUSINESS ENVIRONMENT

Parking supply is *not* a problem in Downtown Hyannis.

Public parking in Downtown Hyannis currently consists of free, two-hour spaces along Main Street itself; free, six-hour spaces in four publicly-owned lots (North Street West, North Street East, Red Cross and Town Hall) as well as metered spaces in a host of privately-owned lots.

Many merchants are convinced that visitors, locals or both expect parking either in front of and as close as possible to their destinations, and several voiced frustration when some stalls along Main Street were temporarily eliminated by the street barriers. One even suggested the addition of a deck with hundreds of spaces.

This perception, however, is not supported by the available data. In a recent survey conducted for Downtown Action Strategy, parking only ranked sixth on the list of negatives. And our pedestrian-intercept survey indicated an average walk time from space to destination of just 4.25 minutes – relatively fast for a popular tourist destination.

According to Nelson/Nygaard's 2017 parking study, the more than 13,000 spaces in Downtown Hyannis offer more than enough supply -- even in the most in-demand locations, at the busiest times of the day and during peak tourist season – if effectively managed. It concluded that there was *no* need for additional surface or structured parking anytime soon.

Aside from the data itself, it apparently still needs to be said that in-front parking, while possible at a Mashpee Commons, a Festival at Hyannis (or soon, the Landing at Hyannis), is simply *not* a reasonable expectation in a Downtown setting, especially one as vibrant at certain times of the year as Main Street, nor is it necessarily decisive.

Of course, consumers would *prefer* to maximize their convenience, but would a little bit of inconvenience would truly be a deal-breaker for them? For some older residents and "in-and-out" businesses, perhaps -- but are those the customers and categories that Main Street should be prioritizing above all others?

After all, some businesses might be struggling to attract (or retain) patrons because they are not (or no longer) compelling enough – in their product, pricing, atmospherics, marketing, etc. – to *justify* the walk. If they cannot (or do not think they could) survive in Downtown without in-front spaces, are they worth keeping?

Moreover, successful large-scale shopping destinations – both Downtowns *as well as* shopping centers -- have always been ones that balance the availability of conveniently-located parking with the need to draw foot traffic past (and hopefully, *into*) as many businesses as possible.

Indeed, this twin imperative explains a great deal about how traditional malls have long been designed, with the department stores located at the opposite ends and with obstacles cleverly placed within the visitor's sight line so that she walks (rather than drives) the distance between them, passing all the "in-line" shops along the way.

In the same vein, parking facilities, as anchor uses, should -- to the extent possible – be sited as to ensure that as many storefronts as possible fall within the pedestrian flow thus generated. In a Downtown setting heavily reliant on foot traffic, in-and-out spaces amount to the opposite.

To the extent that there is any real parking "problem" in Downtown Hyannis, it has to do not with the adequacy of the supply, but rather, its efficient utilization. Due to a variety of factors (all of them previously mentioned in the 2017 parking study), including the lack of "demand-based" pricing, competing demand from employees as well as the poor visibility of and safety perceptions surrounding the pedestrian pathway to/from Main Street, the off-street lots are rarely even close to full.

BUSINESS ENVIRONMENT

The only wayfinding sign along Route 132 pointing to “Hyannis Main Street”, lost amidst the cacophony of the Airport Rotary.

Downtown Hyannis is largely invisible to visitors driving along major thoroughfares.

Most visitors to Cape Cod arrive by car. This has long been the case, but never more so than during the pandemic, when international tourism was severely limited and domestic travel was largely drive-in.

Those coming from the west along U.S. Route 6 (the “Mid-Cape Highway”) reach Hyannis via Exit 68 (fka Exit 6), entering the town along Route 132 (Iyannough Road). However, the highway signage merely mentions “[Route] 132 – Barnstable, Hyannis” – there is no reference to a “Historic Downtown”, “Main Street” or “Hyannis Center”, let alone the myriad reasons why it might be worth visiting, like “Shopping”, “Dining”, “J.F.K. Museum”, etc.).

Once driving southbound along Route 132, motorists are not alerted to its location or even its existence until the Barnstable Road turn-off from the Airport Rotary, at which point the BID’s sail logo appears on a tiny sign, easily lost amidst the surrounding visual cacophony, with an arrow pointing to “Hyannis Main Street.” (They might, however, be tempted to take the left at Phinney’s Lane to “Barnstable Village.”)

There are a few cryptic signs, one just south of Phinney’s Lane, another in front of the Cape Codder Resort & Spa and a third at the turn-off to Bearses Way, telling southbound drivers to continue along Route 132 to reach “Hyannis Ctr” (though it is never mentioned after Bearses Way) and to turn right for “Hyannis West End” (with no clarification of what that refers to).

As motorists proceed in the direction of this mystical “Hyannis Ctr” and *before* they reach the “Hyannis Main Street” sign at the Airport Rotary, they pass every one of Route 132’s (well-signposted) large shopping centers, including the Festival at Hyannis, Southwind Plaza, the Cape Cod Mall, Christmas Tree Promenade and Capetown Plaza (eventually to become The Landing at Hyannis).

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Downtown Hyannis is largely invisible to visitors driving along major thoroughfares.

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Even if one were to turn right at Bearses Way (where the Town has spent millions in the name of creating an attractive gateway) and head in the direction of "Hyannis West End", they would eventually, five minutes and one signpost-less major intersection (with Route 28) later, reach the rotary at Bassett Lane at which point they are provided with… no wayfinding assistance whatsoever.

Visitors traveling westbound along Route 6 – from, say, Provincetown or Brewster -- would also likely take Exit 68, even though Exit 72 (fka Exit 7) would provide for a more direct route to Main Street via Willow Street / Yarmouth Road – one, incidentally, that would *not* take them past all of the shopping center competition along Route 132.

However, the formal signs on the westbound approach to Exit 72 and along Willow Street advertise either for "W. Yarmouth / Yarmouth Port" or for "Hyannis" – there is no welcoming or gateway signage for Hyannis (whereas such come-on's have been erected for Yarmouth), nor any mention of a Downtown Hyannis, either along the way or at the major intersection with Route 28.

Only when one finally arrives at the intersection with Main Street does "Welcome to Historic Downtown Hyannis" appear in gold letters on a monument sign. Even there, however, no directional assistance is provided; the motorist lucky enough to have found his/her way to this point must infer that a right turn is called for.

This lack of attention to the inbound experience reflects a troubling blind spot, one that not only frustrates visitors – especially newcomers – but also, with Exit 68, puts Main Street and its businesses at a competitive disadvantage. Indeed, sophisticated retailers have long fought – and paid dearly – for locations that position their stores as close as possible to highway exits as possible, so that consumers see them *before* their rivals.

OPEN

BUSINESS ENVIRONMENT

The long-dormant 337-345 Main Street parcel, and the underutilized 181 North Street property

Main Street contains several large, underutilized properties in dire need of redevelopment.

The forward progress of Downtown Hyannis has long been held back by a handful of large, underutilized properties occupying central locations along its Main Street, yet their use, condition and prospects seem not to change from one year to the next, with seemingly ever less hope among community stakeholders that they will become something *more*.

The most stubborn of these is 337-345 Main Street aka the “Hibel Building” (image above), a 0.39-acre parcel with a vacant, 7,500 sq ft structure at the signalized intersection of Main Street and Ocean Street, with the latter serving as the primary southbound route to Hyannis Harbor and the Hyannis-Nantucket Ferry. It sits adjacent to a free public parking lot.

Despite these selling points, the property has been vacant since 2008, when it was sold at a foreclosure auction, with the owner since that time having yet to follow through on plans for a mixed-use development.

Other dated, rundown and/or underutilized properties along Main Street that would justify such attention include 181 North Street (Hyannis Health and Human Services Center – image above), 569 Main Street (the Hyannis Oaks Courtyard complex), and 627 Main Street (one-story strip mall with faux windmill).

Meanwhile, 181 North Street, 473 Main Street (the Hyannis Inn), 627 Main Street and 640-644 Main Street are problematic for another reason: with their building setbacks, they disrupt the continuity of the pedestrian experience, signaling that the walkable stretch of Main Street is ending and dissuading strollers from continuing on.

PHYSICAL ENVIRONMENT

Main Street contains more than a few dated, tired-looking storefronts.

Downtown Hyannis currently suffers from a significant number of dated, tired-looking storefronts that detract from its curb appeal and brand. While beauty is very much in the eye of the beholder and while a certain ramshackle charm has always been a part of the quaint, seaside aesthetic, the fact is that in too many of the business signs and displays along Main Street just look anachronistic and/or rundown.

Given the competitive context, there is growing urgency in a refresh. Not only does Downtown Hyannis compare unfavorably to other Cape Cod village centers like Chatham's, which stand on the right side of quaint, but also, it must compete with lifestyle centers such as Mashpee Commons and soon, WS Development's "The Landing at Hyannis", which will offer an even heavier dose of spit and polish.

Most merchants in Downtown Hyannis seem to understand the stakes. 42 of the 58 respondents to the LRRP business survey (72%) felt that the renovation of storefronts and building facades was either "important" or "very important." Among different kinds of assistance, the availability of low-cost financing for such improvements generated the second-highest level of interest.

The Town of Barnstable has long relied on Federal Community Development Block Grant (CDBG) monies for its Commercial Façade Improvement Program (CFIP), which was proposed for continuation in the 2021 Annual Action Plan, with a "focus on sign and awning improvements."

However, information on the program at the Town of Barnstable's website or its "Business Barnstable" page is extremely limited and/or nearly impossible to locate. Moreover, merchants have complained in the past that applications for CDBG funds were simply not worth the trouble, citing challenges associated with procurement policies, Davis-Bacon wage requirements and documentation of benefits to low/moderate-income recipients. Indeed, awards for just one façade and two signs have been given since its inception.

Key Findings

PHYSICAL ENVIRONMENT

Downtown Hyannis continues to struggle with public safety perceptions, especially among local residents.

Engagement with merchants and other stakeholders undertaken for the 2019 retail positioning and tenanting strategy revealed a great deal of concern about the social services population in and around Downtown Hyannis, specifically in the East End (centered on 278 Main Street, then the home of the Baybridge Clubhouse) and on the Village Green.

According to outreach undertaken at the time as part of a branding exercise for the Cape Cod Chamber of Commerce, its presence barely seemed to register with tourists from elsewhere across New England and beyond, but figured prominently in the minds of local residents, reinforcing a stigma that had long attached to Downtown Hyannis as the most "urban" and "gritty" of Cape's village centers.

Compared, say, to Boston's infamous "Mass & Cass" intersection, the scale of the problem in Downtown Hyannis was and is quite modest, but it rises in visibility during the off-season, when no longer diluted by the heavy tourist-driven foot traffic of the peak summer months.

Also, when one's frame-of-reference is based on districts where it is virtually nonexistent (e.g. Osterville, Barnstable Village, Chatham, Falmouth, Mashpee Commons) – and when the town's name has long been associated with "Camelot" -- even a relatively small contingent can have a disproportionate impact on perceptions.

As a result, local residents tend to rank among the town's *worst* ambassadors and all too often choose to shop elsewhere, depriving Main Street of critical patronage during the slow off-peak season. The negative perceptions also lead to other inefficiencies: the 2017 Nelson/Nygaard study, for example, pointed to concerns about lighting and safety as a barrier to greater utilization of the existing off-street parking supply.

The 2019 strategy largely sidestepped the issue of social services as one that was not going to be solved by a retail-focused scope of work and that was unlikely to change all that much in the near term, choosing instead to focus on what *would* be possible and *could* realistically co-exist with this population – not as an endorsement of current conditions, but rather, as a sensible approach to take in light of the circumstances.

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PHYSICAL ENVIRONMENT

Downtown Hyannis continues to struggle with public safety perceptions, especially among local residents.

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In the ensuing two years, the realities on the ground appear, at least anecdotally, to have improved somewhat, perhaps due in part to the relocation of the Baybridge Clubhouse. Yet it did not move far – to a space less than two blocks north, on Bassett Lane -- while numerous other providers remain nearby, with Downtown Hyannis still very much the epicenter of the Cape's social services ecosystem.

While the subject does not seem to dominate like it did in 2019, negative perceptions clearly linger, surfacing yet again in some of the merchant interviews -- 49 of the 58 respondents (84%) to the LRRP Business Survey described improvements in safety and/or cleanliness as either "important" or "very important" -- as well as recent landlord surveys collected by the BID.

The stakes will rise still further when WS Development's "The Landing at Hyannis" materializes along Route 132 in the coming years, offering local residents a privately-controlled, reassuringly sanitized outdoor space for shopping, dining and recreating in close proximity to Main Street.

THREE WORDS TO DESCRIBE HYANNIS

As this word cloud from our intercept surveys clearly demonstrates, homelessness and public safety barely register with the peak-season foot traffic; they are almost exclusively the preoccupation of year-round residents.

OPEN
BUSINESS ENVIRONMENT

Route 132 as Barnstable County's retail hub

Downtown Hyannis is challenged by a severe drop-off in consumer demand and foot traffic during non-peak months.

Downtown Hyannis has long struggled with a severe drop-off in consumer demand and foot traffic once summer tourists and second-home owners leave town, especially during the months of October, November, January, February and March

As discussed at length in the 2019 retail positioning and tenanting strategy, this can be attributed to several factors:

- Its trade area of 53,444 people in 92.44 square miles translates to a population density of just 578 persons per sq m, fitting the U.S. Census Bureau's definition of "rural."
- While Hyannis is the undisputed retail hub of Barnstable County, that status is almost entirely due to the regional draws along Route 132 (see image below), which include the only Cape Cod locations for Macy's, Kohl's, Target, BJ's Wholesale Club, Old Navy, Sephora, ULTA Beauty, Best Buy, Dick's Sporting Goods, Barnes & Noble, Whole Foods Market, Trader Joe's and a host of others. Main Street, on the other hand, contains little that would compel residents to visit on a regular basis.
- Main Street does not play a prominent role in the regional roadway network that would force motorists to pass through *en route* to other destinations. Unlike Route 132, it is not directly accessible to and from Route 6. Meanwhile, Route 28 effectively serves as an east-west bypass *around* Main Street. Even affluent denizens of nearby Hyannis Port are forced to take South Street while driving eastbound through town.

In other words, Main Street does not really figure in the routines of locals, either their commuting patterns or their shopping habits. As a result, it does not enjoy the sort of repeat visibility that serves to establish and reinforce what is known as "consumer mindshare". Locals might go there every so often -- for a specific purpose or destination like, say, a coveted designer label at Puritan, churrascaria at Brazilian Grill or a "Sunday Streets" event – but otherwise, *it is not really on the map.*

This gets to the heart of what drives residents as consumers. Unlike visitors who are in town for leisure, these are people going about their day-to-day lives. In deciding which businesses to patronize, they are motivated to a far greater extent by convenience than impulse. And in this respect, Main Street – with its absence of conventional retail anchors, its out-of-the-way location, its one-way directionality and its lack of in-and-out parking -- cannot compete with the alternatives.

Locals are not just more likely to be deterred by inconvenience, however. Like all of us, they are subject to the lure of nostalgia, and prone to viewing (and judging) their main street within the context of how they remember it from the past. For them, it is not just there for a drop-in visit; rather, it is a part of their respective communities. As such, it must capture their aspirations, reflecting how they want to see themselves and be seen by others.

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BUSINESS ENVIRONMENT

Downtown Hyannis struggles with a severe drop-off in consumer demand and foot traffic during non-peak months (continued)

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For these reasons, their judgments on the subject can seem disproportionately harsh. Long familiar with their main street's foibles and flaws, many of them have developed perceptions and biases that have only hardened over time, reinforced by conversations with others as well as op-eds in the local media, resulting in what sometimes feels like one big "echo-chamber" of negativity and despair as well as a heightened sensitivity to perceived slights from without.

Since such an entrenched dynamic is not easy to reverse, local residents typically imply much higher costs (than visitors) for what is know in the industry as "customer acquisition". That is, main streets and their individual businesses usually need to expend considerably greater energy and resources – more intensive marketing and deeper promotions, for example -- in order to attract them initially and then to retain them as repeat customers over time, translating to slimmer margins and smaller returns.

There are some indications, however, that entrenched habits might have started to loosen amidst the pandemic. Proprietors that reported robust sales during the 2020 holiday season cite among other factors a more conscious effort among year-round residents to "shop local" in response to the heavy strains placed on small businesses last year.

Meanwhile, this population has been growing. Not only did full-time occupancy on the Cape increase significantly in the last decade, from 53% to 58%, but also, Barnstable County welcomed net in-migration of roughly more than 5,000 residents in 2020, according to a Cape Cod Commission analysis of USPS data of permanent address changes – ranking *fourth* among all metro areas across the U.S. with 50,000 or more people. They arrived *without* established shopping habits (or preconceptions), and in many cases, with above-average incomes.

At the same time, Downtown will face ever fiercer competition for their expenditures from Route 132, not just in the form of new-to-market anchors like Target and Dick's, but also, with WS Development's "The Landing at Hyannis" lifestyle center, which will likely suck away at least some of Main Street's oxygen for at least its first one or two years.

Key Findings

Downtown Hyannis does not make it easy for retail entrepreneurs to find their way to Main Street

While one might think that a pandemic is not the time to take risks, data from the Economic Innovation Group indicates that new business applications hit their highest level of record in 2020, increasing 24% from 2019, with retail trade as the most active sector, rising 54% year-over-year. Yet challenges remain in ensuring that entrepreneurs looking for a storefront on the Cape seriously consider Main Street.

When a business interested in or just curious about locating in Downtown Hyannis wants to find more information on the opportunity, it has a few options. It can consult a local commercial real estate broker. It can call the phone numbers listed in the "For Lease" signs on vacant storefronts. It can – and apparently often does, in this case – reach out to the Town Manager

None of these is ideal. A commission-based broker, for example, might have an interest in steering such a tenant towards a space that he/she exclusively represents, or that sits outside the Downtown and would be an easier sell. Meanwhile, separately contacting the representatives of each advertised space is time-intensive and inefficient. Such an approach might also miss un-advertised, "off-market" opportunities. Finally, the Town Manager may or may not be aware of all the possibilities, and he has many other responsibilities besides.

Ideally the tenant would be able to peruse all the possibilities in one single place. Yet neither the Hyannis Main Street BID website (www.hyannismainstreet.com) nor the Town's "Business Barnstable" webpage (www.businessbarnstable.com) offers a comprehensive database of available storefronts, instead simply listing local brokerages with contact information. The latter also provides a link to the for-sale properties on the Cape Cod & Islands' Multiple Listings Service (MLS).

It is for this reason that MJB Consulting's 2019 retail strategy recommended an update and expansion of both portals, to include such a database as well as other information that such users would not easily or cost-effectively be able to find on their own.

Key Findings

BUSINESS ENVIRONMENT

The incentive structure within which landlords and brokers operate leaves critical voids in Downtown's retail tenanting ecosystem

Most retail leasing in suburban and rural settings involves shopping centers, where, historically, landlords and brokers needed to do little more than post a "For Lease" sign and wait to be contacted. The locations effectively sold themselves, with their anchor stores, their traffic counts, their in-front parking and their common ownership/ management.

This same approach is less likely to work, however, in a Downtown setting, where the case is not as self-evident or the site selection analysis so straightforward, where the "sell" might have to rely on a vision for the future (rather than the reality of the present), and where, as a result, one must be far more creative in (re)-framing the opportunity and proactive in generating visibility for it.

Landlords and their broker representatives, it is also critical to note, focus on the leasing of their individual spaces. Their flyers tend to devote less space to the district as a whole, other than to provide data points historically used to pitch suburban strips (e.g. demographics within 3, 5 and 10-mile radii) but generally less meaningful for Main Street locations.

In other words, no one is "selling" Downtown Hyannis as a retail location, and even if they were, they would not necessarily know *how*. As a result, opportunities to entice and land tenants with more of an urban or Downtown sensibility – ones, say, from larger markets like Providence or Boston – are missed because the right "language" is not being spoken.

It is not just that, however. Typically, the process of identifying the leads in the first place takes place without much consideration for what they would mean for the overall district.

(Most) landlords tend to opt for the most credit-worthy tenant that pays the highest rent and requires the smallest tenant-improvement allowances (or "T.I."). Indeed, this is considered so axiomatic in real estate that many property owners seem genuinely confused when asked to contemplate broader leasing imperatives such as district-wide mix (let alone lofty ideals like "community wellbeing").

Shopping centers, by their very nature, incentivize property owners to think in terms of overall mix, as there is the realization that overall retail sales, rent levels and property values are maximized when tenants mutually reinforce one another, when they generate cross-traffic for each other – the proverbial whole that is greater than the sum of its component parts.

Downtowns, however, are different. Landlords of individual storefronts have far less incentive to consider the broader impact, as they are not necessarily the ones that would benefit from such synergies, nor can they be certain that other property owners will follow suit. Opportunities for a more cohesive retail mix are thereby missed, leaving the district to operate at a competitive disadvantage vis-à-vis shopping centers.

The leasing industry's incentive structure creates an additional wrinkle. Retail brokers survive on the basis of commission: they typically do not have the security of a base salary, and can only make money if a lease is actually signed. As a result, they are understandably deal-driven and focused solely on matching space to tenant, with little thought to what that means for the rest of the district.

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BUSINESS ENVIRONMENT

The incentive structure within which landlords and brokers operate leaves critical voids in Downtown’s retail tenanting ecosystem

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Because of how they are incentivized and/or have been trained, brokers understandably tend to gravitate to the “lowest-hanging fruit” – the deals that are easiest to complete, the tenancies that do not need much convincing, etc. – which, in turn, mostly reinforces what has worked before. Revitalizing or elevating Downtowns, however, often demands businesses that could catalyze a new direction or add a new dimension.

Moreover, brokers in smaller markets must often be generalists, with volume of business in any one property or locational type rarely sufficient to justify specialization. As a result, their base of knowledge and network of contacts does not typically reach beyond their sphere(s) of influence: they are not always aware of broader trends or comparable projects in Downtowns elsewhere, or expansion-minded “chain-lets” from other metros.

None of this is meant to cast aspersions on property owners or leasing professionals. Indeed, it is *entirely understandable* that they act like they do. And there *are* notable exceptions, in Hyannis and elsewhere. The point is merely to shed light on the disconnects that result from actors employing standard operating procedure, to understand how such systemic forces might be redirected for Downtown’s benefit.

Project Recommendations

Examine the feasibility of two-way conversion for Main Street/South Street and consider continuation of the expanded sidewalks and street barriers in the peak summer months

Category	Public Realm
Location	Main Street and South Street, from Ocean Street to the West End fork
Origin	Hyannis Main Street BID and the Town of Barnstable
Budget	High Budget ($200,000 and up), with possible funding sources (for different elements) including the Commonwealth's State and Local Fiscal Recovery Fund (as aid to impacted small businesses, industries -- Travel & Tourism, Hospitality -- and government, as "revenue replacement"); EDA's Economic Adjustment Assistance Program (as aid for for Travel, Tourism and Outdoor Recreation); MassDev's TDI Creative Catalyst and Commonwealth Places; MassDOT's Shared Streets and Spaces; Community One-Stop for Growth's Urban Agenda and Massachusetts Downtown Initiative (for technical assistance); Office of Travel and Tourism's Destination Development Capital (DDC) Program; T-Mobile's Hometown Grant
Timeframe	Short Term (<5 years)
Risk	High Risk (see "Action Steps / Process")
Key Performance Indicators	Pedestrian counts, retail sales, merchant satisfaction, pedestrian safety
Partners & Resources	The Town of Barnstable, Hyannis Main Street BID, Greater Hyannis Chamber of Commerce, property and business owners

Diagnostic:

As noted earlier in the "Key Findings" section, the two-way conversion of both Main Street and South Street would provide greater visibility for and access to Main Street businesses, especially for/to the more affluent communities to the west and southwest, while asserting once and for all the primacy of Downtown Hyannis' role as a true pedestrian-oriented village center.

Downtowns across the country have been shifting away from one-way road networks for decades. A 2018 study by the University of San Francisco and San Diego State University, looking at two-way conversion in six districts across the country, points to a correlation with growth in food, beverage and entertainment spending; construction of new housing; and in-migration of higher-income households.

Closer to home, other popular tourist-driven main streets on the Cape – like Chatham and Falmouth – have long provided for two-way traffic, without apocalyptic results. And Chatham does not appear to offer any "straight-shot" alternative for through-traffic.

Meanwhile, the expansion of the sidewalk and installation of barriers along Main Street has provided a vital boost to Main Street businesses amidst pandemic-era social distancing requirements and proclivities, supplementing lost capacity within the four walls while also accommodating additional foot traffic outdoors.

While some aspects would need to be tweaked, continuation of this experiment -- during the peak summer months, only -- would not just reflect the preferences of the overwhelming majority of visitors *and* merchants, but also, serve the purpose of foregrounding Main Street as the kind of "special place" that would help to elevate it as a destination within the broader competitive firmament.

In the hierarchy of larger walkable districts on the Cape, Downtown Hyannis cannot match the profile, cachet and draw of Provincetown, Chatham, Falmouth, Mashpee Commons (and, soon perhaps, the new Landing at Hyannis): a differentiated, European-style street scene can be an important part of the larger effort to change that.

Finally -- *and not insignificantly* -- it would signal to prospective developers, investors and tenants from beyond the Cape that Hyannis/Barnstable is a forward-looking community which does not let a small buy vocal minority dictate its willingness to consider bold moves and innovative thinking.

Action Item / Process:	Our recommendation is as follows: - One lane for westbound traffic and one lane for eastbound, from Labor Day to Memorial Day; South Street becomes two-way as well - One lane as an expanded sidewalk on Main Street, from Memorial Day to Labor Day; one lane for westbound traffic on Main Street and one-way eastbound on South Street Both of these projects – the two-way conversion of Main Street/South Street and the reinstallation of the street barriers in upcoming summers – will be the subject of design charrettes and a community process this fall, which will presumably grapple with a much wider range of considerations and imperatives beyond just the impact on walkable retail. Yet even though we are viewing the matter through the admittedly narrow lens of retail, we put forward our recommendation nonetheless because we strongly believe that both design charrettes and community processes should be informed by – indeed, *start from* – such expert guidance, in order to preempt the ascendancy of opinions rooted in anecdote, misinformation and/or self-interest. (Continued on next page)

Action Item / Process:

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In the event that the political will does not exist to continue with the expanded sidewalks and street barriers next summer, the Town should at the very least enact a program allowing individual merchants to erect parklets in front of their businesses – by now a well-established best practice across the country – and providing both technical and financial assistance for design and installation.

By July, the City of Boston had already granted 556 new outdoor dining permits as part of its 2021 Outdoor Dining Program, 315 for parklets erected in parking spaces or roadway – a stark turnaround for a city that had long been reluctant to encourage such uses. Prior to the pandemic, 81% of its restaurants did not have a patio, and the ones that did exist tended to be small.

In what the *Boston* Globe has termed “patio-palooza”, restauranteurs in the city have started to move beyond the utilitarian installations of the 2020 summer, investing much larger sums of money on more elaborate setups that include, for instance, string lights, lush vegetation, cabana-style curtains, etc.

Improve the physical conditions of Town-owned parking lots, enhance their connectivity to/from Main Street as well as explore a demand-based parking management scheme and Parking Benefit District

Category	Public Realm
Location	Downtown Hyannis – Census Tract 153
Origin	Hyannis Main Street BID and the Town of Barnstable
Budget	Large Budget ($200,000+), with possible funding sources (for different elements) including the Commonwealth's State and Local Fiscal Recovery Fund (as aid to impacted Travel & Tourism industry); EDA's Economic Adjustment Assistance Program (as aid for for Travel, Tourism and Outdoor Recreation); MassDev's TDI Creative Catalyst and Commonwealth Places; MassDOT's Shared Streets and Spaces; Community One-Stop for Growth's Urban Agenda and Massachusetts Downtown Initiative (for technical assistance); Office of Travel and Tourism's Destination Development Capital (DDC) Program; T-Mobile's Hometown Grant; National Endowment for the Arts (through regional arts agency)
Timeframe	Short Term (<5 years)
Risk	Medium Risk (see "Action Items / Process"
Key Performance Indicators	Parking utilization and turnover (which would need to be regularly monitored and evaluated, for refinements to the demand-based approach), pedestrian counts, retail sales as well as visitor satisfaction levels
Partners & Resources	Hyannis Main Street BID, Town of Barnstable, private parking-lot owners and merchants as well as other impacted stakeholders

Municipal parking lots serving Main Street (in red)

Diagnostic

As noted earlier in the "Key Findings" section and established in Nelson/Nygaard's 2017 study, there is more than adequate parking supply in Downtown Hyannis. Furthermore, the expectation of in-front parking is not a realistic one in a Downtown setting, nor, for most customers, is its absence necessarily a deal-breaker. Finally, such in-and-out spaces undermine the goal of encouraging pedestrian flow throughout the entirety of the district.

That said, Downtown Hyannis does need to make more efficient use of its existing supply, partly as a way of addressing perceptions among residents and some merchants, which assumed even greater prominence with the loss of on-street spaces to the expanded sidewalks during the pandemic and will undoubtedly reemerge if / when a new parklet program is approved (see project sheet #1).

Some of this, in fact, is low-hanging fruit. Nelson/Nygaard pointed, for example, to the importance of the pedestrian pathway between parking space and Main Street, in light of concerns about perceived lack of safety. Even more than that, though, it represents an often-unrecognized opportunity to shape first impressions, build a sense of anticipation and predispose the user/visitor to a memorable experience.

On the most basic level, it implies a physical upgrade of the Town-owned lots themselves, with weed removal, regrading and repaving as well as new lighting, landscaping and shading. (Wayfinding, along with a possible parking app, will be covered as part of a separate funding request). It also calls for expansion of the BID's efforts to activate, amenitize and beautify the connecting alleyways with distinctive signage and lighting, public art, visitor services, etc.

Space permitting, micro-enterprise might even be brought into the mix. In fact, an empty space or existing business with separate entrances on both Main Street and one of the off-street lots could double as an (interior) alleyway and dedicate excess square footage along that pedestrian pathway to rotating pop-up entrepreneurs eager to leverage the foot traffic generated by the parking lot "anchor".

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Diagnostic

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The Nelson/Nygaard study also offered some more ambitious strategies that could have a meaningful impact but appear never to have been initiated or implemented, like a demand-based approach to parking management, which prices spaces in such a way – highest in the busiest sub-areas, then decreasing with distance – as to promote turnover and make better, more efficient use of the entire supply.

Such schemes are now well-established as an industry best practice, ensuring that at least some stalls are available in the most in-demand locations at all times while also maximizing the use of existing parking resources and precluding the need for (expensive) new ones. The Downtown of Salem, MA had long struggled with parking challenges before instituting such a system in 2010.

Meters would also generate an additional funding stream that can be reinvested in the Downtown (see "Best Practice" below). State enabling legislation gives so-called "Parking Benefit Districts" wide latitude in how such revenue can be utilized, as long as there is a positive impact on the overall parking experience, e.g. wayfinding and signage, streetscape and beautification, parklets, marketing and special events, even Cultural District activities.

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Diagnostic

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Arlington, MA, which used to charge only for its off-street lots, decided to proceed with a more comprehensive demand-based approach and institute paid parking on the street while at the same time creating a Parking Benefits District that has funded the installation of planters in its pandemic-era patios and will eventually pay for permanent outdoor-dining infrastructure and landscaping.

The creation of a Parking Benefit District, with its promise to reinvest parking-meter revenue in tangible Downtown improvements of particular relevance to business and property owners (rather than, say, other spending priorities in the General Fund), could also help to blunt criticism and build support from such quarters.

That said, concessions might still have to be granted in order to secure full buy-in, like, for instance, a first half-hour free on Main Street. Furthermore, options will need to be considered and a strategy devised for the portions of "public" parking lots that are privately-owned.

Finally, a demand-based approach would be even more effective with the implementation of two other strategies recommended in the Nygaard study: the incorporation of privately-owned parking lots into the supply and an expanded system for employee permits, both of which would help in freeing up closer-in spaces for customers. (The Town is already working to move ferry parking to the airport).

Arlington, MA funded the installation of planters in its pandemic-era patios through its new Parking Benefits District

Action Items / Process:

- The Town commences with a physical upgrade of Town-owned lots, with weed removal, regrading and repaving as well as new lighting, landscaping and shading
- The BID develops a plan in concert with property and business owners to activate, amenitize and beautify the connecting alleyways with distinctive signage and lighting, public art and visitor services
- The BID retains a consultant team with expertise in parking and facilitation to build consensus and secure buy-in to a demand-based parking management scheme as well as explore the possibility of a Parking Benefit District.

Add new signage (or adjust existing signage) along Route 132, Route 6 and feeder roads alerting and directing motorists to Downtown Hyannis

Category	Public Realm
Location	Route 132 (Iyannough Road / Route 6 to Airport Rotary), Route 6 (Mid-Cape Highway / Exits 68 and 72) and feeder routes
Origin	Jane Walsh, Red Fish Blue Fish
Budget	Medium Budget ($50,000 to $200,000), with possible funding sources including: the Office of Travel and Tourism's "Travel and Tourism Recovery Grant Program" and "Destination Development Capital (DDC) Program"; Commonwealth's State and Local Fiscal Recovery Fund (as aid to impacted Travel & Tourism industry or as "revenue replacement" for government); EDA's Economic Adjustment Assistance Program (as aid for for Travel, Tourism and Outdoor Recreation)
Timeframe	Short Term / 0-5 years (or Medium Term if MassDOT will not consider the request earlier)
Risk	High Risk (given that MassDOT just recently installed new signage along Route 6)
Key Performance Indicators	Traffic patterns that indicate both the number of turn-offs at Exits 68 and 72 as well as the use of access routes to Downtown Hyannis
Partners & Resources	MassDOT, Town of Barnstable, Hyannis Main Street BID, Cape Cod Commission, Cape Cod Chamber of Commerce,

An example of the kind of sign along Route 6 that would help to alert and direct motorists to Downtown Hyannis

Diagnostic

As noted earlier in the "Key Findings" section, the near-complete absence of directional and wayfinding signage alerting and directing motorists to Downtown Hyannis from Route 6, Route 132 and feeder roads not only hampers its regional visibility and access but also puts Main Street and its businesses at a disadvantage vis-à-vis its Route 132 rivals.

This shortcoming potentially undercuts the potential of Downtown Hyannis to more fully leverage its appeal as a "drive-in" tourist destination during the pandemic, amidst the widespread hesitation to fly and a severe contraction in international travel. Alternately, it frustrates those motorists who are visiting it for the first time.

Unfortunately, MassDOT recently erected new signs along Route 6 as part of its changes to the exit-numbering system, so the agency might be reluctant to revisit the matter so soon. However, it would be considerably cheaper, and probably more realistic, to request the addition of "Downtown Hyannis" to existing ones (the "Centerville / Craigsville Beach" exit, for example).

The Town of Barnstable has more direct influence on Route 132, where it shares responsibility with MassDOT; Willow Street, which it controls south of Camp Street; and Bearses Way, which is Town-owned. At key decision points along these routes, it can install new, highly visible signage featuring Hyannis Main Street's new logo and branding package as well as other teasers.

Action Item / Process

Initial steps include the following:

- The Town convenes a working group consisting of the Hyannis Main Street BID and other major Downtown stakeholders to develop a plan for signage upgrades along Town-controlled roads as well as identify preferred upgrades along Route 132 that it would want to present to MassDOT
- The Town then convenes a larger working group also including the Cape Cod Commission, the Cape Cod Chamber of Commerce and key elected officials to identify preferred upgrades along Route 6, then devise a strategy for approaching MassDOT about both Route 132 (above) and Route 6

Establish a quasi-public entity to spearhead the redevelopment of long-underutilized parcels in Downtown Hyannis

Category	Private Realm
Location	Parcels scattered along Main Street between Yarmouth Road and the West End Rotary in Downtown Hyannis
Origin	Wendy Northcross, former CEO of the Cape Cod Chamber of Commerce and new Executive Director of the John F. Kennedy Hyannis Museum, though the idea has been advanced by the Town more than once in the past, including attempts in 2004 and 2014
Budget	Medium ($50,000 to $200,000), with possible funding sources including: the Office of Travel and Tourism's "Destination Development Capital (DDC) Program"; Community One-Stop For Growth's Urban Agenda, 43D Expedited Permitting and Massachusetts Downtown Initiative (for technical assistance); MassDev's Commonwealth Places (to demonstrate potential of redevelopment)
Timeframe	Medium Term (5 to 10 years)
Risk	High Risk
Key Performance Indicators	Additional users (e.g. residents, students, patrons, etc.), pedestrian counts, retail sales, tax revenue
Partners & Resources	Town of Barnstable, Hyannis Main Street BID, property owners, major tenants (e.g. Commonwealth of Massachusetts), elected officials, community stakeholders and land use attorneys

Diagnostic

As noted earlier in the "Key Findings" section, the forward progress of Downtown Hyannis has long been held back by a handful of large, underutilized properties occupying central locations along its Main Street, yet their use, condition and prospects seem not to change from one year to the next, with seemingly ever less hope among community stakeholders that they will become something *more*.

Great streets, however, find ways to deal with these problem properties. And in this case, the urgency of doing so, of "upping Main Street's game", has only increased, with the plans for WS Development's new lifestyle center on Route 132, which aims to co-opt aspects of Main Street's appeal (if not poach from among its best merchants, as the Cape Cod Mall did a half-century ago).

Drawing on "creative placemaking" strategies, the Hyannis Main Street BID was able to use Commonwealth Places funding during the pandemic to provide some activation along the frontage of 181 North Street, but ultimately, properties like these will need more dramatic and permanent revamps, involving wholesale redevelopment.

The more permanent solution would consist of either working with existing owners or, in some cases, acquiring the properties – either through negotiation or, if necessary, eminent domain – and then conveying them to buyers with the ambition, capacity and resources to redevelop them in ways that modernize Main Street's built form, appearance and function while contributing far more to its health and vitality.

Specifically, targeted properties could offer opportunities for additional generators of consumer demand, including, for instance, new apartment complexes, educational institutions, cultural attractions and public plazas – all of which represent the kinds of new "anchors" needed to sustain year-round businesses now that traditional retail ones (e.g. department stores) no longer exist.

As part of this process, such buyers – if they ones already active in and committed Hyannis -- would need to be identified and vetted, then pitched and sold on the opportunity, *in advance of* property acquisition. Such efforts could rather easily be incorporated into the role envisioned for the Hyannis Main Street BID in retail recruitment.

While land acquisition is always preferred, taking control of these parcels might in some cases require at least the threat of eminent domain in order to bring their current owners to the negotiating table.

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Diagnostic

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Massachusetts, as one of the only states that did not strengthen private property rights in the aftermath of the *Kelo v. City of New London* decision, still grants to communities the authority to take by eminent domain whatever is deemed necessary “to effectuate the goals of urban renewal”, including the “elimination of decadent, substandard or blighted” areas and the promotion of the “sound growth of the community.”

This has proven controversial in Hyannis before, as when the Town considered the creation of a “Community Development Board” in 2004. However, the less intensive “Growth Incentive Zone”, instituted in 2018 in lieu of an urban renewal plan, has not yet had the desired catalytic effect, suggesting that the “high-risk/high-reward” approach might ultimately prove to be the only way.

After all this time, the case for bold action seems patently clear. And with few apparent legal constraints, it becomes a matter of whether elected officials and their appointees have the appetite and requisite fortitude for the inevitable pushback. One point worth noting, though: having just sold her property on Main Street, the leader of the opposition in 2004 (and since) might be less active this time around.

Action Item / Process

Initial steps include the following:

- Before proceeding with a feasibility study, the Town first convenes a Task Force of community stakeholders, including known “fence-sitters”, to make the case for and secure buy-in to the concept of such a quasi-public entity, clarifying what it would and would not be able to do; demonstrating what it could accomplish for Downtown; explaining what would be at stake without such bold action; etc.

Revamp the Town's façade improvement program to encourage greater utilization among business and property owners

Category	Public Realm
Location	Downtown Hyannis – Census Tract 153
Origin	While the Town of Barnstable already has a façade improvement program, MJB Consulting recommended "alternative, less restrictive funding sources for signage and façade overhauls" in its 2019 strategy. With little apparently having changed since, we are again making the same recommendation here
Budget	Medium Budget ($50,000 to $200,000), with possible funding sources including: municipal self-funding (see accompanying "Best Practice" sheet); Community Preservation Act revenue or the Massachusetts Historical Commission's Massachusetts Preservation Project; the Commonwealth's Coronavirus State and Local Fiscal Recovery Fund (as assistance for impacted small businesses, industries – Travel & Tourism, Hospitality, and governments); EDA's Economic Adjustment Assistance Program (as aid for for Travel, Tourism and Outdoor Recreation); T-Mobile's Hometown Grant
Timeframe	Short Term (0 to 5 years)
Risk	Low Risk
Key Performance Indicators	Program utilization, retail sales and property values
Partners & Resources	Town of Barnstable's Planning & Development Department, Hyannis Main Street BID, property and business owners

Diagnostic

As noted earlier in the "Key Findings" section, Downtown Hyannis currently suffers from a significant number of dated, tired-looking storefronts that detract from its curb appeal and brand. While beauty is very much in the eye of the beholder and while a certain ramshackle charm has always been a part of the quaint, seaside aesthetic, the fact is that in too many of the business signs and displays along Main Street just look anachronistic and/or rundown.

Given the competitive context, there is growing urgency in a refresh. Not only does Downtown Hyannis compare unfavorably to other Cape Cod village centers like Chatham's, which stand on the right side of quaint, but also, it must compete with lifestyle centers such as Mashpee Commons and soon, WS Development's "The Landing at Hyannis", which will offer an even heavier dose of spit and polish.

Even with a more effective façade improvement program than the poorly utilized one the Town currently offers, uptake can remain a challenge, as the property and business owners with the greatest need for these enhancements are also often the least interested in taking advantage – which can help to explain why their storefronts are in such shape to begin with.

However, most merchants in Downtown Hyannis seem to understand the stakes. 42 of the 58 respondents to the LRRP business survey (72%) felt that the renovation of storefronts and building facades was either "important" or "very important." Among different kinds of assistance, the availability of low-cost financing for such improvements generated the second-highest level of interest.

The Town of Barnstable's existing CDBG-funded program has barely been used, with awards distributed for just one façade and two signs since its inception. Increasing utilization will likely necessitate a new funding source and marketing approach, with matching grants or forgivable loans, a cap that is high enough to justify the time and expense (in contrast to the current consideration of *lowering* the maximum award to just $2,000), as well as free design guidance (from an on-call local architect).

It is also worth noting that other funding sources can be put towards a wider range of improvements besides just the basics, covering not just signage, awnings and lighting but also, interior enhancements like window displays and exterior ones such as planters and landscaping. Indeed, they can even help to fund the outdoor dining and selling areas that have proliferated amidst the COVID-19 pandemic.

Action Items / Process

Initial steps include the following:

- Convene a working group of property and business owners as well as other relevant stakeholders to gather feedback, introduce alternatives and secure buy-in to a new approach
- Ensure flexible design guidelines that account for the inherent subjectivity of aesthetic and cultural preference as well as the need to cater to multiple consumer markets (as per the 2019 retail positioning and tenanting strategy)

If Barnstable is unable to secure alternative funding, it might look to the Boston suburb of Ashland, MA, which decided to self-fund its façade improvement program, approving at Town Meeting a pot of money that provides matching grants for up to half of the cost or $5,000, whichever is less, with eligibility also extended to planters and landscaping, even surface parking lots

https://www.ashlandmass.com/669/Business-Incentive-Programs).

If the Town is ultimately forced to continue relying on CDBG dollars, it should take a more proactive approach in selling the program directly to would-be beneficiaries, offering to help with the paperwork as well as providing lists of eligible designers and contractors, streamlining approvals, etc.

Also, with limited CDBG funding, the Town might consider matching grants (rather than loans) for a first few participants, to visually demonstrate the program's value to others, then revert to loans thereafter. Or it could change the financing to zero-interest, with deferred payments.

Adopt a fresh approach to dealing with safety perceptions in Downtown Hyannis

Category	Public Realm
Location	Downtown Hyannis – Census Tract 153
Origin	Main Street merchants and the Hyannis Main Street BID – dating at least to the 2019 retail positioning and tenanting strategy
Budget	Low Budget (less than $50,000), with possible funding sources including the Town of Barnstable (justified by the resulting reduction in policing costs and increase in sales tax revenue); the Commonwealth's Coronavirus State and Local Fiscal Recovery Fund (as assistance for impacted industries – Travel & Tourism, Hospitality -- and governments); EDA's Economic Adjustment Assistance Program (as aid for Travel, Tourism and Outdoor Recreation) or Statewide Planning, Research and Networks (as a pilot for a fresh approach); MassDOT's Shared Streets and Spaces Program.
Timeframe	Short Term (0 to 5 years)
Risk	Low Risk
Key Performance Indicators	Pedestrian counts (particularly in the evenings); policing costs; service calls for panhandling or disorderly behavior; ongoing surveys of merchants and residents; off-season retail sales
Partners & Resources	Town of Barnstable (Planning & Development, Community Services, Public Works, Police), Cape Cod Chamber of Commerce / business owners, property owners, hoteliers, John F. Kennedy Hyannis Museum, social service providers

Diagnostic

As noted earlier in the "Key Findings" section, safety perceptions have long been a preoccupation among local residents and Main Street merchants, resulting both in leakage of retail sales during the off-season months, a generalized negativity about Downtown Hyannis as well as various second-order effects (e.g. inefficient utilization of the parking supply).

The subject does not seem to dominate like it did during the 2019 retail positioning and tenanting strategy, yet negative perceptions clearly linger, surfacing yet again in some of the merchant interviews -- 49 of the 58 respondents (84%) to the LRRP Business Survey described improvements in safety and/or cleanliness as either "important" or "very important" -- as well as recent landlord surveys collected by the BID.

Indeed, it has only become more important with the explosion of outdoor dining during the pandemic and the possibility of a parklet program going forward. The stakes will rise still further when WS Development's "The Landing at Hyannis" materializes along Route 132 in the coming years, offering local residents a privately-controlled, reassuringly sanitized outdoor space for shopping, dining and recreating in close proximity to Main Street.

To realize meaningful and sustained gains, however, a different strategy will be needed, one extending beyond the basics -- "clean-and-safe" investments and visible police patrols, for instance -- that are often mistakenly thought to be sufficient in addressing the issue.

Rather, it would embrace a more comprehensive approach, known as "Safedesign", that integrates a much broader range of enhancements and refinements in the physical environment, special events, strategic communications and other areas.

For example, a nuanced assessment of the physical environment would also consider informal cues along the pedestrian pathway, like signs of disorder or territoriality, absence of "natural surveillance", condition of gateway corridors, etc., while an evaluation of communications would evaluate messaging and crisis-management strategies within the broader context of public perception and place branding.

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Diagnostic

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It would employ better metrics that account not only for levels of actual crime but also, the extent of “place avoidance.” Attention will be focused not just on the experiences of those who already visit (and like) Main Street but also, even more crucially, the reasons why others *stay* away from it.

Finally, drawing on the concept of ”varying safety thresholds” (chart below), it would seek to understand the perspectives and perceptions of different user groups, including, most importantly, women (by far the largest consumer cohort), also evaluating how they feel at night (say, when walking alone).

There is ample evidence for the increased efficacy for such an approach. Its application reduced panhandling along Downtown Cleveland’s Euclid Avenue by more than 80%, dramatically improved safety perceptions and activity levels in Riviera Beach, FL’s Marina District, and led to major increases in foot traffic for urban neighborhoods in both Tampa and West Palm Beach. It is currently being implemented in Minneapolis and St. Louis.

Action Item / Process:

Initial steps include the following:

- Develop a working group for settling on expectations, goals and limitations as well as a scope-of-work, then retain the services of a seasoned expert with a successful track record of implementing such an approach

Sponsor and coordinate a shared marketing and advertising campaign on behalf of Downtown Hyannis merchants

Category	Revenue & Sales
Location	Downtown Hyannis – Census Tract 153
Origin	LRRP Business Survey
Budget	Medium Budget ($50,000 to $200,000), with possible finding sources including: the Commonwealth's Coronavirus State and Local Fiscal Recovery Fund (as assistance for small businesses and impacted industries – Hospitality); the Massachusetts Office of Business Development's Regional Pilot Project Grants; EDA's Economic Adjustment Assistance Program (as aid for Travel, Tourism and Outdoor Recreation -- on the grounds that the continued health of the small businesses so integral to the tourist experience in Downtown Hyannis demands such locally-targeted marketing as well)
Timeframe	Short Term (0 to 5 years)
Risk	Low Risk (see "Action Items / Process")
Key Performance Indicators	Retail sales, pedestrian-intercept surveys, medium/channel-specific analytics
Partners & Resources	Hyannis Main Street BID, Cape Cod Chamber of Commerce, business owners, local media

Diagnostic:

Downtown Hyannis has long struggled not just with the severe drop-off that occurs once summer tourists and second-home owners leave -- as noted earlier in the “Key Findings” section -- but also, according to some merchants, a baffling ignorance among many year-round residents about the appealing businesses that exist there (and, in some cases, have operated for decades).

A shared advertising campaign was cited by 37% of those who answered the LRRP Business Survey as the form of business assistance in which they would be most be interested, by far and away highest percentage among the programs offered. Also, marketing strategies were deemed either “important” or “very important” by 46 of the 59 respondents (78%).

The Hyannis Main Street BID is already hard at work on this front, having recently announced that, in concert with North American Directory Services, it will be offering significantly discounted rates on advertising placements placed in rooms and at front desks of area hotels and resorts starting in 2022.

Eager, however, to retain the ”Shop Local” momentum amidst the pandemic and set in place a more lasting commitment to Main Street, a number of the merchants there are also interested in participating in a joint advertising campaign targeting *year-round* residents in the off-peak season.

Meanwhile, full-time occupancy on the Cape increased from 53% to 58% in the last decade, and Barnstable County welcomed net in-migration of roughly more than 5,000 residents in 2020, according to a Cape Cod Commission analysis of USPS data of permanent address changes – ranking *fourth* among all metro areas across the U.S. with 50,000 or more people.

The true newcomers within this contingent -- recently arrived, without established shopping habits (or preconceptions), and generally, of above-average affluence -- present a golden opportunity for Downtown businesses, but one with a brief window, requiring immediate action.

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Diagnostic:

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The urgency of such a campaign has and will become still greater with the additions along Route 132, including new-to-market anchors (Target, Dick's Sporting Goods, etc.) as well as WS Development's upcoming "Landing at Hyannis" lifestyle center, which will likely suck away at least some of Main Street's oxygen for at least its first one or two years.

Small businesses, however, are challenged to fund locally-targeted advertising placements on their own, especially if they are already having to spend money for call-outs on the various maps and kiosks designed for summer tourists by the BID, Discovery Map, etc.

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Diagnostic:

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On many Main Street(s) across the country, merchants have pooled their resources and developed group advertisements that promote the districts as well as showcase individual businesses. Jane Walsh of Red Fish Blue Fish and Amanda Converse of Love Live Local took the lead in coordinating various joint efforts during the pandemic, but place-management entities have considerably more bandwidth for such initiatives.

The Wichita Downtown Development Corporation (KS), for instance, budgeted $25,000 to cover 50% of the expense for a six-month campaign consisting of large advertisements in local mainstream, business and community newspapers, with each one featuring a specific category (e.g. shopping, dining, entertainment) and up to nine individual businesses that pay a maximum of $250.

Meanwhile, Downtown York Inc. (PA), a BID and Main Street organization, publishes its own "Downtown York" magazine three times per year, in which it offers advertising opportunities at subsidized rates to Downtown merchants, and distributes 35,000 copies across the region annually.

It is worth noting that this publication does not just provide a platform for the businesses themselves but also, serves as one of several mediums in a more comprehensive marketing effort – also including a website, digital advertisements, billboards, banners, window clings, shopping bags, tee-shirts and selfie walls – meant to build interest in and drive visitation to the district.

In other words, the benefits of a cooperative advertising campaign can increase exponentially if it is integrated as part of a broader effort that identifies the target customer(s), establishes a clear and meaningfully differentiated brand identity most likely to resonate with her, then communicates it through the channels specific to her ecosystem.

In the case of Downtown Hyannis, such a brand identity should be grounded in the findings and recommendations of the 2019 retail positioning and tenanting strategy, and in order to have credibility with local residents, would also need to (obliquely) address the negative perceptions surrounding public safety discussed elsewhere in this Plan.

Action Steps / Process:

The Hyannis Main Street BID would be the logical lead for a cooperative advertising initiative: if the Town were to play a visible role (beyond, say, behind-the-scenes funding), there could be pushback from business owners in other districts across Barnstable (e.g. Osterville, Barnstable Village), and if a membership-based organization were to do so, participation from non-member businesses could be depressed.

Also, risks would rise if the cooperative advertising were expanded into a broader branding and marketing campaign, the development of which can expose (or exacerbate) tensions between disparate stakeholders. In such case it would be of critical importance to identify and hire a creative agency with a track record of dealing forthrightly with such messiness as well as establishing credibility with and common purpose among the various factions.

Initial steps would include the following:

- Assign a lead entity for coordinating the cooperative advertising campaign
- Establish a budget for implementation, in concert with funding partners
- Hire a creative agency to design the overall template and advise on placement
- Determine costs to individual business/advertiser
- Create a transparent process for soliciting and selecting businesses/advertisers (in the event of high demand)

Establish the Hyannis Main Street BID as a more effective “information clearinghouse” for interested retail tenants, brokers and investors

Category	Private Realm
Location	Downtown Hyannis – Census Tract 153
Origin	MJB Consulting, as a recommendation in its 2019 retail positioning and tenanting strategy
Budget	Low Budget (less than $50,000) – with technical assistance to be provided by MJB Consulting as part of its LRRP scope-of-work (in lieu of field work and research which had already been undertaken for the 2019 strategy)
Timeframe	Short Term (0 to 5 years)
Risk	Low Risk
Key Performance Indicators	Establishment and ongoing maintenance of the clearinghouse; number of unique views
Partners & Resources	The Town of Barnstable as well as Downtown landlords and brokers

Diagnostic:

As noted earlier in the "Key Findings" section, there is a need for clear point person to field and handle interest among prospective tenants in Downtown Hyannis, and it has only grown amidst the pandemic, with the storefronts that have emptied as well as the entrepreneurs that have materialized during that time.

The 2019 retail positioning and tenanting strategy recommended an update and expansion of both the Hyannis Main Street BID's website (www.hyannismainstreet.com) and the Town's "Business Barnstable" webpage (www.businessbarnstable.com), to more effectively serve an "information clearinghouse" function that includes a comprehensive database of available spaces, with contact info for their respective landlords and/or brokers, as well as other information that prospective tenants (or their tenant-rep brokers) would not easily or cost-effectively be able to find on their own (e.g. quantification of the tourist / visitor submarket, new cellphone-tracking data from Arrivalist, etc).

Such a revamped resource would also leverage the opportunity to "pitch" and sell the locational advantages of Downtown Hyannis, drawing on the case outlined by and data referenced in district-wide leasing collateral (see the next project sheet). Communities rarely get a chance to speak directly to the would-be tenant in the middle of its decision-making process: this is one that they should make sure to seize.

Finally, the Hyannis Main Street BID might want to consider contracting with suppliers of pedestrian counts. These vendors utilize newer video-detection technologies that generate continuous tallies and data reports for various locations over a 24-hour period. Such data would serve three purposes. One, a growing number of the BID's contemporaries – which represent both benchmarks and, in a sense, competitors – are doing the same. Two, with the blurring of sales channels raising questions about how to assign value to physical stores, foot traffic might increasingly serve as the basis for asking rents and be monetized as a source of revenue for the organizations that can provide such information. And three, it would provide a baseline against which the BID (and the Town) could demonstrate the value of its efforts over time.

Action Item / Process:

MJB Consulting will provide list of data and information to be gathered as well as guidance on organization and ongoing maintenance.

In the name of establishing a clear point "person" and given the BID's Downtown-specific mandate as well as its closer relationships with property owners, this function should be housed on the BID's website, with a prominent link on the Business Barnstable page -- even though the BID and the Town would work closely together on the gathering and regular updating of the data.

In terms of pedestrian counts, the BID should explore pricing from among the service providers active in the space, of which a couple of the best-known are Springboard (https://www.springboard.info/us/) and Eco-Counter (https://www.eco-counter.com/).

Create and “road-show” district-wide leasing collateral that sells Downtown Hyannis to prospective tenants and retail investors

Category	Private Realm
Location	Downtown Hyannis – Census Tract 153
Origin	MJB Consulting, as a recommendation in its 2019 retail positioning and tenanting strategy
Budget	Low Budget (less than $50,000) – already included as part of MJB Consulting’s LRRP scope-of-work (in lieu of field work and research, which was already undertaken for the 2019 strategy)
Timeframe	Short Term (0 to 5 years)
Risk	Low Risk
Key Performance Indicators	Distribution and digital viewings of brochure; growing interest in Downtown Hyannis among intended audiences; retail vacancy rates, rent levels and property values
Partners & Resources	Town of Barnstable Planning & Development, Hyannis Main Street BID, Cape Cod Chamber of Commerce, local landlords and brokers

An example of a district-wide leasing brochure that MJB Consulting helped to develop, for Downtown Raleigh (NC)

Diagnostic:

Many laypeople think of retail as something largely within the control of municipalities and their non-profit partners, citing the proverbial "they" when talking about what kinds of businesses *should* exist in or be lured to a given district – as in, "*they* should bring in more of this" or "less of that."

The reality, of course, is that the public sector has only limited – and, at best, indirect – influence on retail mix. It can be more or less restrictive on permitted ground-floor uses; it can incentivize property owners; it can develop new public infrastructure and (non-retail) demand generators. But ultimately the landlords and the tenants are the ones that make the final decisions.

The public and non-profit sectors can only play a supportive role. However, they can – and in many cases, should -- get more creative and proactive in doing so, identifying and implementing initiatives that fill genuine voids in the retail tenanting ecosystem -- which, in the process, typically enable the private-sector actors to make *more* money than they would have otherwise.

The next two project sheets will propose two such initiatives.

The first addresses the missed opportunities resulting from an inability to properly recognize and fully leverage the appeal of Downtown as a retail location, as was described earlier in the "Key Findings" section.

A district-wide leasing brochure can help to fill this void, offering a broader narrative about where a Downtown is headed and providing data points that confirm such a trajectory – in effect, selling a location that does not necessarily sell itself in conventional terms.

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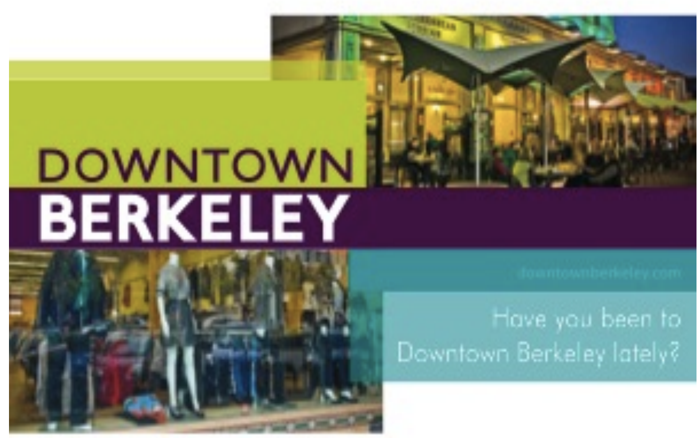
SAN FRANCISCO
Business Times
NET GAINS: FOUNDATIONS SEEK FOR-PROFIT VENTURES
CLOUDERA CEO'S BIG BET ON BIG DATA
FOOD FIRMS SEEK TO BE A CUT ABOVE
Industrial explosion across East Bay
Covered California feels like a million
Can crowdsourcing diagnose diseases?
COVER STORY
BERKELEY GROWS UP



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Critically, such a brochure is *not* the same as a typical marketing piece geared towards consumers or visitors; rather, it is created with the tenant community in mind, employing the language that the industry itself uses, emphasizing the selling points that resonate with private sector actors as well as obliquely addressing their likely concerns.

It would also be written and designed with the goal of reaching *beyond* Cape Cod's leasing ecosystem and drawing the attention of prospective tenants and retail brokerages in *other* markets across New England and beyond – specifically, the kinds of targets originally envisioned in the 2019 strategy.

In our experience, such a tool and the ammunition it provides is usually welcomed by landlords, developers and brokers, and can easily be incorporated into their site-specific packages. In fact, we have found that in some cases, it can even serve a valuable educational purpose.

For example, property owners and leasing professionals in the conservative Southern city of Raleigh (NC) appreciated how our brochure (image below) helped them to better understand the eclectic tastes and retail potential of the "hipsters" and "neo-hipsters" who had descended on their Downtown in recent years.

If, however, the collateral is to convince anyone beyond Cape Cod, it needs to be widely marketed, as part of a "road show" that takes the case directly to other markets (e.g. Providence, Boston, Portland, etc.) and includes sit-downs with tenant-rep brokerages, attendance at (regional) industry conferences, columns and earned media in business publications, etc.

We undertook such a campaign in concert with the release of a district-wide leasing brochure for the Downtown of Berkeley (CA) and succeeded in attracting attention – and ultimately, landing tenants – from San Francisco, which had historically dismissed it as "Be-zerkley" but responded to our efforts to shift the conversation to its enviable densities and demographics as well as its pro-business public / non-profit sector.

Action Items / Process:

The impulse within the public sector and its community partners might be to fixate on consensus and buy-in, making sure to incorporate key stakeholders into the process and the content. This could backfire, however, by diluting the impact. It is generally best to limit the number of "cooks in the kitchen", with a preference for landlords and brokers with both a direct stake in the outcome and/or sophistication with retail tenanting.

Because the Town's mandate includes other stakeholders or "cooks" besides just the few be involved here as well as other business districts besides Downtown Hyannis, the Hyannis Main Street BID would be better positioned to act as the "face" of such an effort, with the Town still deeply involved but in a less visible way.

Some proprietors in Downtown Hyannis might be bothered by any attention given to recruiting *new* tenants (competitors) versus strengthening existing ones, especially after such a difficult eighteen months. Savvy merchants, however, will realize that the two are not mutually exclusive and that, in most categories, expanding the offerings will increase the overall draw and benefit legacy businesses as well.

Initial steps would include the following:

- A modestly-sized stakeholder group, consisting of the aforementioned partners, will be assembled

- MJB Consulting will provide draft copy and work with the BID's graphic designer on layout, graphics and images, meeting with the stakeholder group regularly for input and iterative feedback

- The finalized version will be produced in print form as well as added to the websites of the BID, the Chamber and the Town (Business Barnstable)

- The stakeholder group will develop and implement a plan for local distribution as well as a regional "road show"

Identify and vet regional “chain-lets” that landlords and brokers might pursue for available retail spaces

Category	Private Realm
Location	Downtown Hyannis – Census Tract 153
Origin	MJB Consulting, as a recommendation in its 2019 retail positioning and tenanting strategy
Budget	Low Budget (less than $50,000) – already included as part of MJB Consulting’s LRRP scope-of-work (in lieu of field work and research, which was already undertaken for the 2019 strategy)
Timeframe	Short Term (0 to 5 years)
Risk	Medium Risk (see “Action Items / Process”)
Key Performance Indicators	Leads generated (*not* leases signed)
Partners & Resources	Hyannis Main Street BID, property owners and leasing professionals

Diagnostic:

The second initiative devoted to filling voids in the retail tenanting ecosystem introduced in the "Key Findings" section addresses how opportunities for more cohesive, mutually reinforcing retail mix are missed, and a wider pool of would-be prospects never considered, due to multiple property ownership, commission-based leasing and geographically-limited networks.

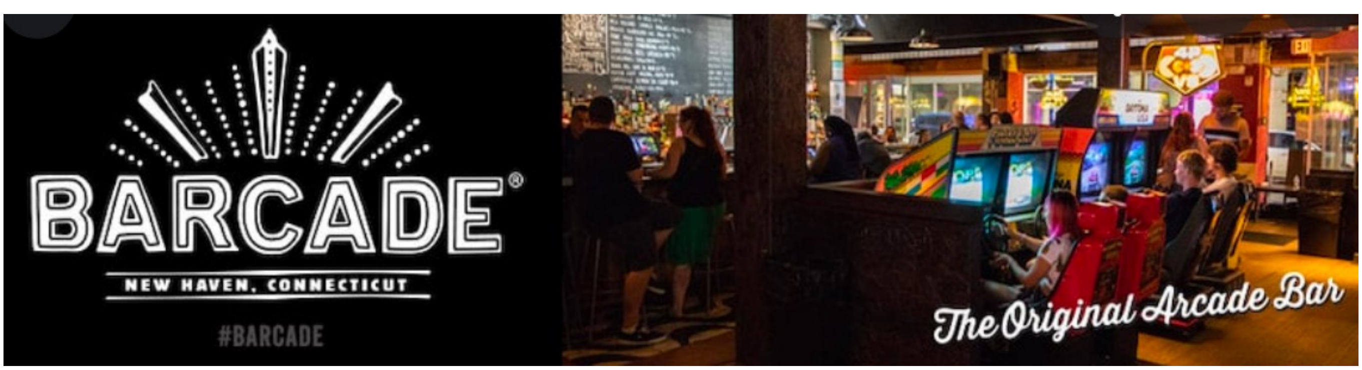
Again, none of this is meant to cast aspersions on property owners or leasing professionals. Indeed, it is *entirely understandable* that they act like they do. The point is merely to shed light on the disconnects that result, and in so doing, to clarify ways in which such systemic forces might be redirected to Downtown's benefit.

For example, a non-profit entity might endeavor to "curate" the retail mix, by identifying specific prospects that would be new to the market and synergistic with existing businesses, passing them through various filters to arrive at the ones most likely to be interested and able to offer reassuring track records, then relaying these leads to landlords and their brokers in a carefully structured process that matches site criteria to available spaces.

The idea is by assuming responsibility for the labor-intensive process of unearthing and vetting more compelling and catalytic tenancies for Downtown, then handing them (for free) to landlords and their brokers on the proverbial silver platter, the public / non-profit sector will collapse the disconnect between how these actors are incentivized and what would serve Downtown's broader interests.

In playing this role on behalf of New Haven's Town Green Special Services District, MJB Consulting successfully pitched Barcade, a Brooklyn, NY-based regional chain-let and originator of the now-widespread bar/arcade format, which we then introduced to a local broker working to fill an available space in the Downtown. Barcade opened there in 2015, its unique concept quickly becoming a popular draw among both students and non-students.

In fact, a number of BID's across North America have even chosen to create a salaried, full-time position dedicated solely or at least partly to this recruiter function, who would supplement and support the efforts of landlords and brokers by identifying, pre-qualifying and pursuing prospects that would serve to create and reinforce a more compelling and synergistic retail mix in their respective Downtowns.



This approach succeeded in luring Barcade, a Brooklyn-based regional chain-let, to Downtown New Haven (CT).

Action Items / Process:

The impulse within the public sector and its community partners is often to fixate on consensus and buy-in, which, in this case, might lead to an insistence that the key stakeholders agree on which prospects should and should *not* be forwarded to landlords. Even more than with the district-wide leasing collateral (project sheet #9), it will be essential to limit the number of "cooks in the kitchen."

Also, property owners sometimes worry that they will somehow lose control or discretion over which tenants can and cannot occupy their spaces, especially if the municipality is visibly involved. For this reason, the Hyannis Main Street BID would be far better positioned to act as the "face" of the effort, and should clarify to landlords that they can do what they want with the leads, without consequence.

Meanwhile, some brokers might be confused by the precise role that the BID would be playing as a third party, and anxious that they will lose commissions as a result. They also might feel insulted by the implication that they have not performed or are incapable of doing so.

In response, the BID should explain its proposed role within the context of structural voids (rather than gross incompetence) as well as point out that the goal is provide them with new, pre-qualified leads (for free) and thereby enable them to earn even *more* commissions.

Finally, as with the district-wide leasing collateral in the previous project sheet, some merchants might decry efforts to recruit *new* tenants (competitors), especially after such a difficult eighteen months. Again, however, the BID should note in response that, in most categories, expanding the offerings will increase the overall draw and benefit legacy businesses as well.

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Action Items / Process:

(Continued from previous page)

Initial steps include the following:

- MJB Consulting (MJB) will canvass relevant markets for and draw on its proprietary database of expansion-minded tenants, then pass each of them through various filters designed to eliminate ones that would not be realistic prospects for Downtown Hyannis, pass muster with property owners and/or synergize with existing merchants

- MJB will develop two-page "detail sheets" on fifteen leads (image below), with relevant information on each (e.g. concept, ownership, history, target market, size/ creditworthiness, expansion plans, site criteria, contact info, etc.)

- MJB will consult the available-spaces database (see earlier project sheet) to match each of these leads to storefronts that would align with their site criteria, then relay their project sheets to the respective landlords / brokers simultaneously

MJB Consulting
Detail Sheets – Downtown San Rafael
FINAL / September 25, 2017

Terra Mia Coffee

Concept: artisanal coffeehouse with single-origin espressos and pour-over coffees as well as Latin-inflected drinks (e.g. horchata lattes, mocha mexicanos, café con leches, etc.); roasts its own beans; coffee skews bold and medium dark (in contrast to the lighter, mellower roasts in vogue today); interiors look the part, with granite counters and leather couches; offers free WiFi; pricing similar to other up-market coffeehouses (e.g. $2.75 for coffee, $3.25 to $5.00 for lattes)

Ownership: Ulyssess Romero, an L.A. native and resident; received a B.A. from UC Berkeley and an MBA from Stamford, has also worked as a financial consultant; apprenticed under Martin Diedrich, founder of Diedrich Coffee (a Southern California-based coffee roaster and café chain popular during the '80's, '90's and early '00's)

History: founded in 2008 by Ulyssess Romero; originally focused on Latino immigrants, starting with a number of locations in the working-class Latino communities of Southeast Los Angeles -- first one was in Southgate; expanded to Downtown Los Angeles in 2012 before debuting in the Bay Area with cafes in San Francisco/Bernal Heights in 2013 and Oakland/Uptown in 2014

Target Market: Latinos and non-Latinos; families; hipsters and "coffee geeks"; students, including ones in high school; some locations see their highest volumes at night, often from Latinos

Size/Creditworthiness: 12 locations, 10 in Southern California and 2 in the Bay Area; each new location (after the initial one) has been funded from cash flow

Expansion Plans: three to five new locations per year; opened last year in Los Angeles' hipster-heavy Highland Park neighborhood, about to open in Montebello and Long Beach; has expressed interest in the past (2012) in Berkeley, Palo Alto, San Leandro, Hayward and San Jose; expansion in the Bay Area could accelerate if/when Romero decides to open a roasting facility here

An example of a "detail sheet" on a tenant lead

Appendix

Massachusetts DHCD Rapid Recovery Plan Program

BUSINESS SURVEY REPORT

This report provides the results of a business survey conducted during March and April of 2021. The survey is part of a program launched by the Massachusetts Department of Housing and Community Development to help communities develop Rapid Recovery Plans for downtowns and commercial districts. The survey was directed to owners or other appropriate representatives of business establishments located in the targeted commercial areas. (For Data Tables, see page 9.)

Barnstable

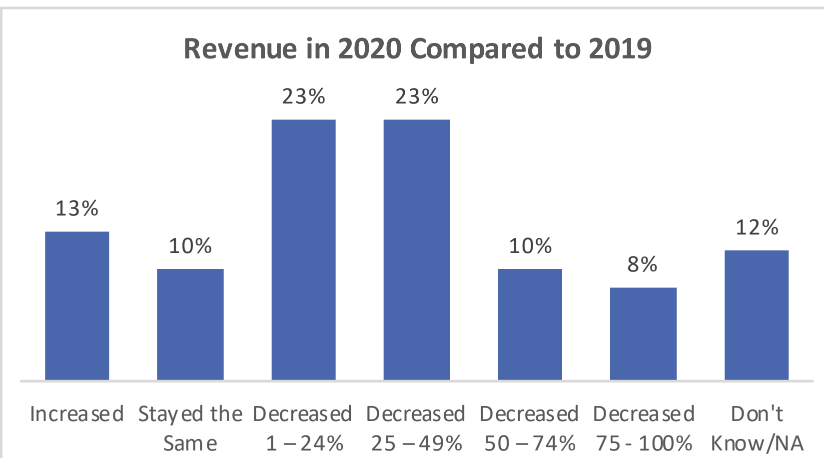
Downtown Hyannis Business District

Responses: 60

Impacts of COVID-19

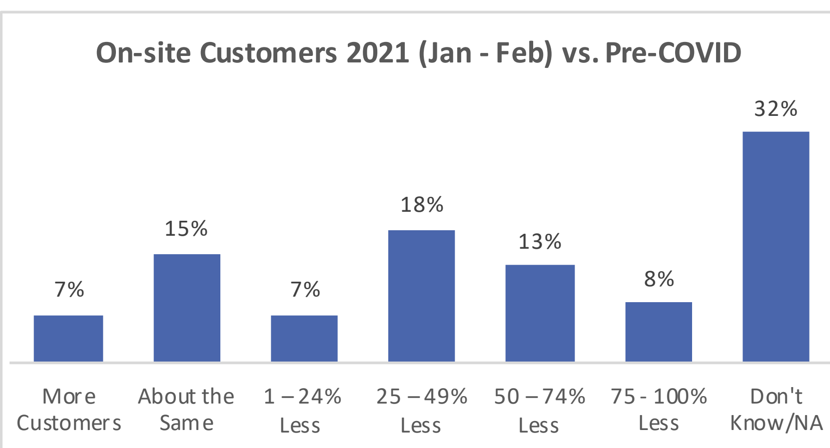
Decline in Business Revenue

64% of businesses generated less revenue in 2020 than they did in 2019.
For 41% of businesses, revenue declined by 25% or more.



Less Foot Traffic in Commercial Area

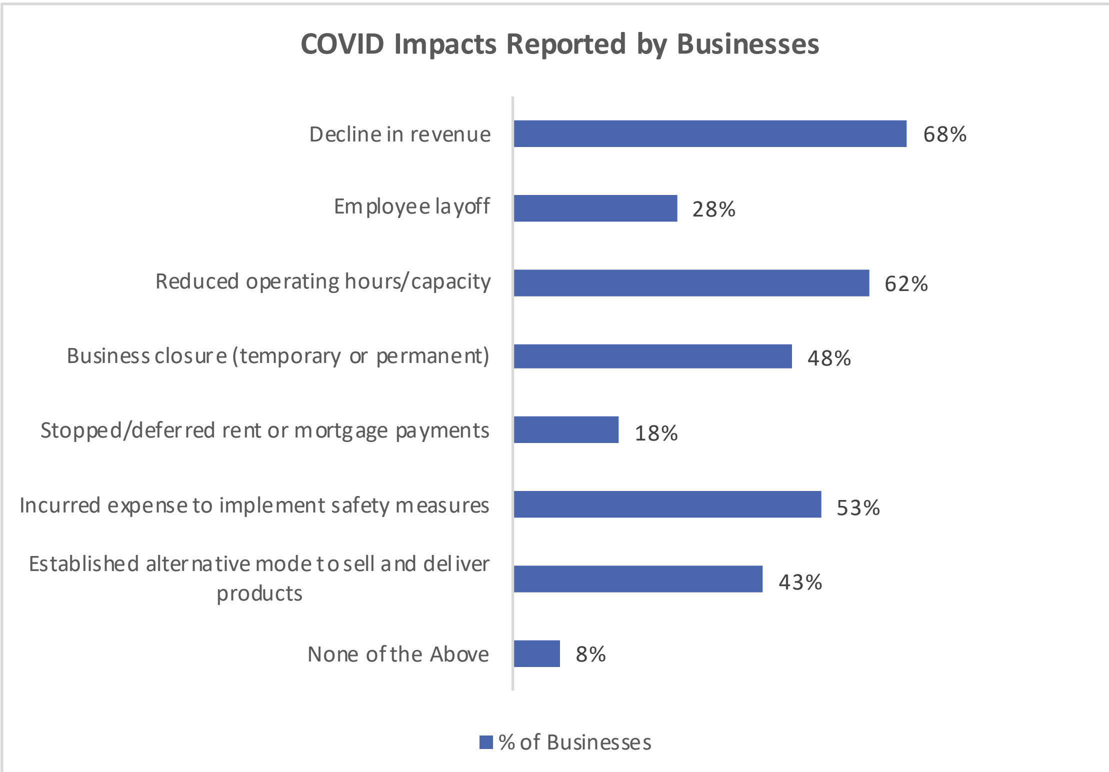
46% of businesses had less on-site customers in January and February of 2021 than before COVID.
39% of businesses reported a reduction in on-site customers of 25% or more.



Impacts of COVID-19 (cont'd)

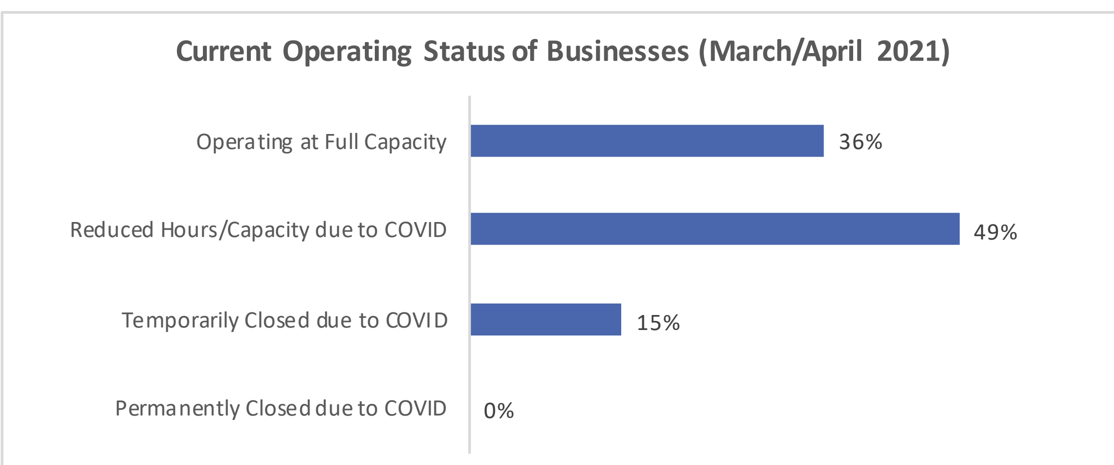
Reported Impacts

92% of businesses reported being impacted by COVID.



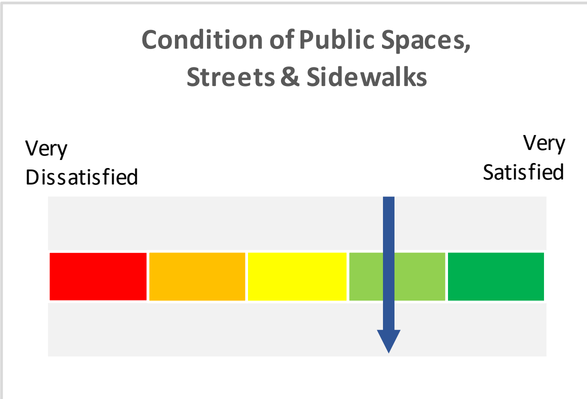
Operating Status

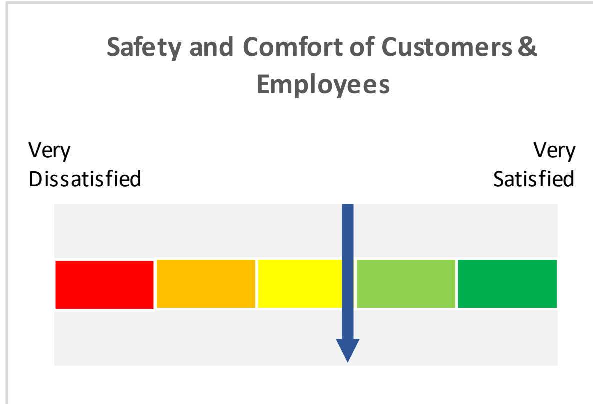
At the time of the survey, 64% of businesses reported they were operating at reduced hours/capacity or closed.

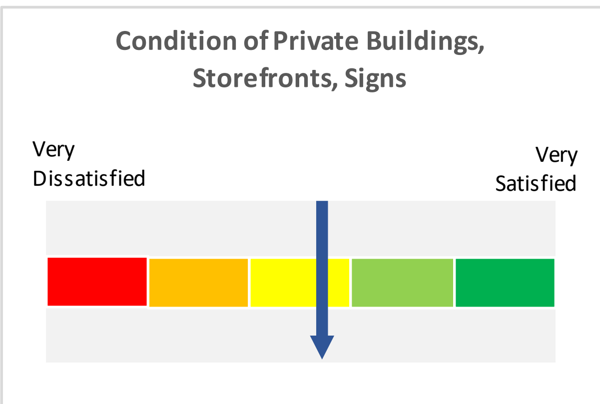


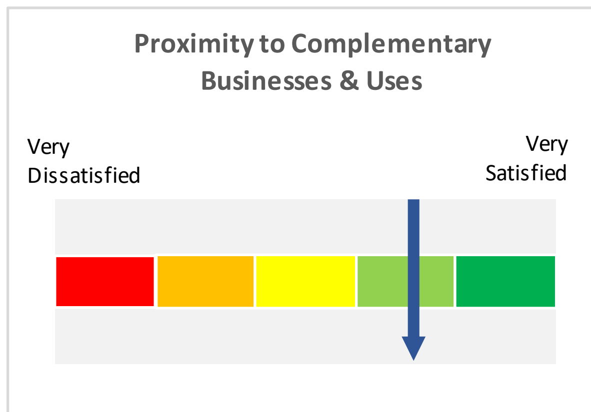
Business Satisfaction with Commercial District

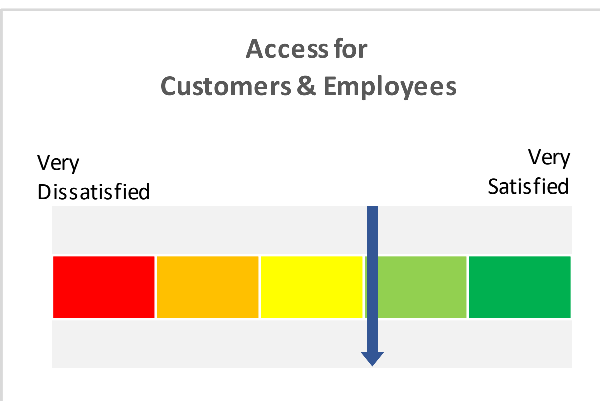
The charts below illustrate the average satisfaction rating among respondents regarding various elements.







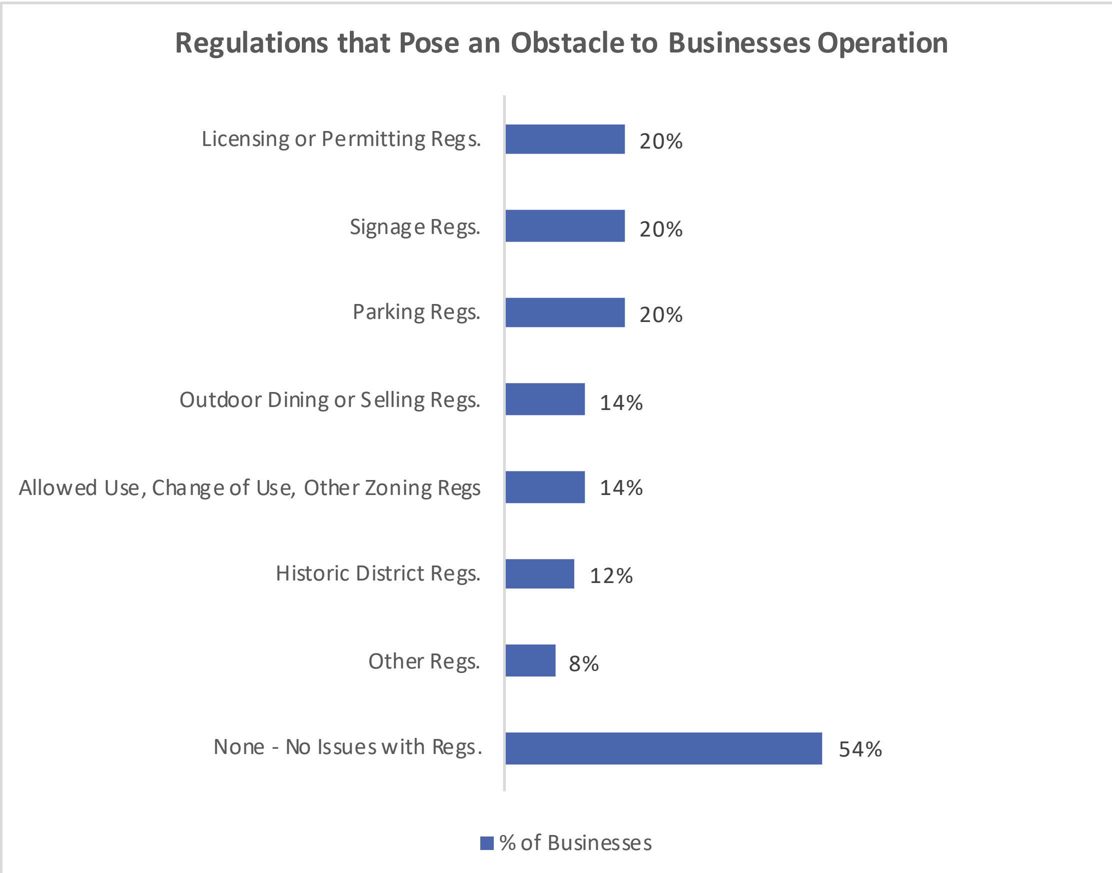




Business Satisfaction with Commercial District (cont'd)

Regulatory Environment

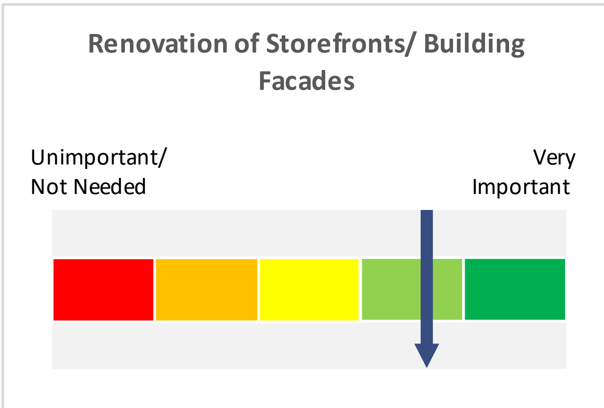
46% of businesses indicated that the regulatory environment poses an obstacle to business operation.

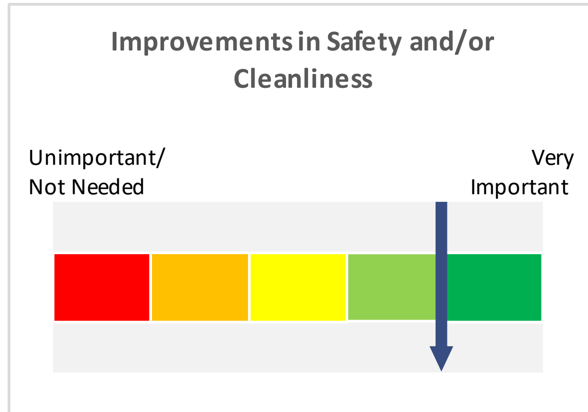


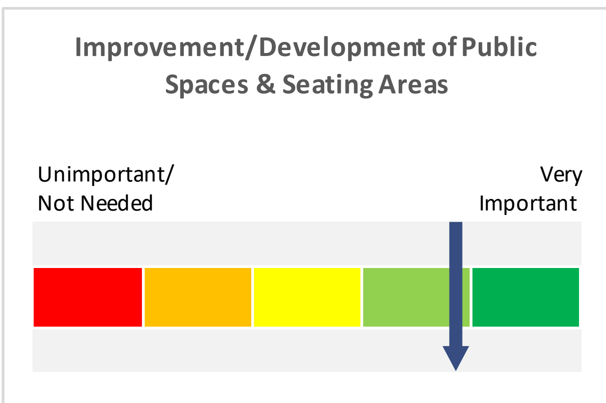
Business Input Related to Possible Strategies

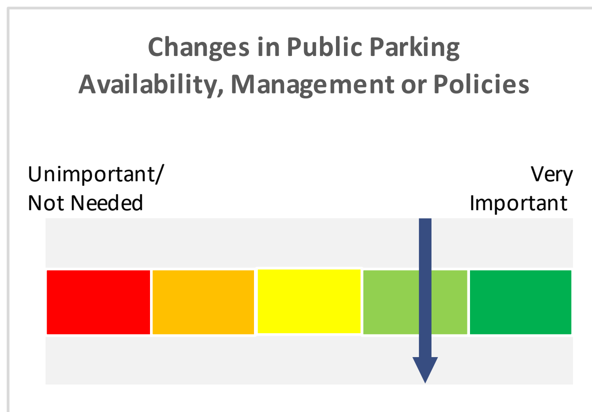
Physical Environment, Atmosphere and Access

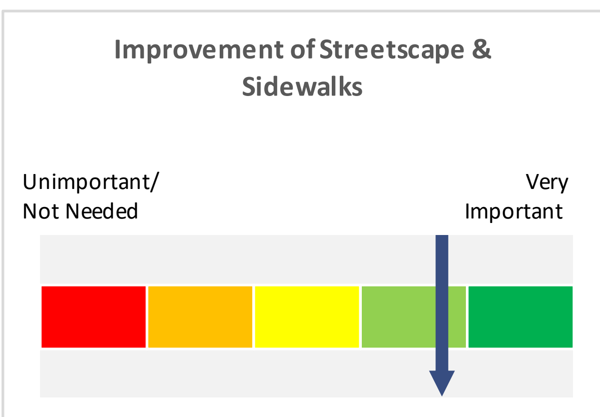
The charts below illustrate the average rating among respondents regarding importance of various strategies.

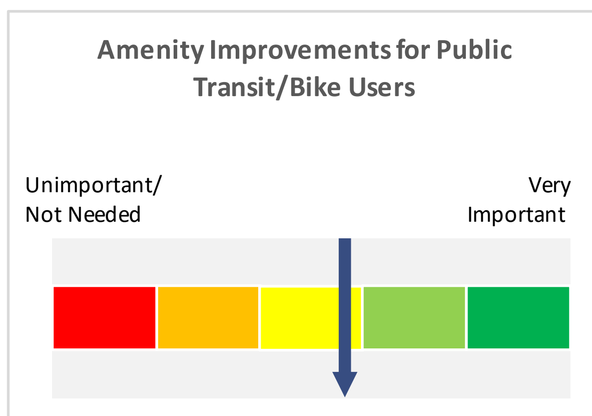








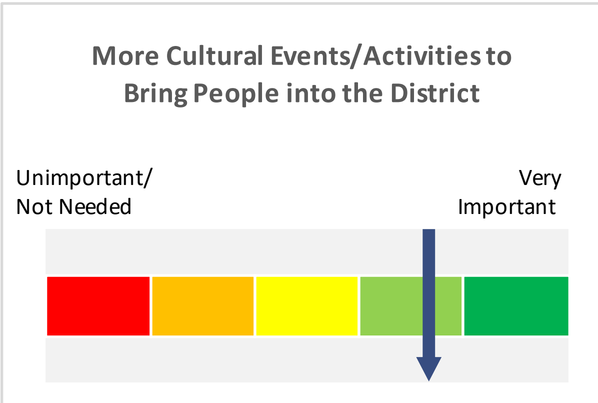


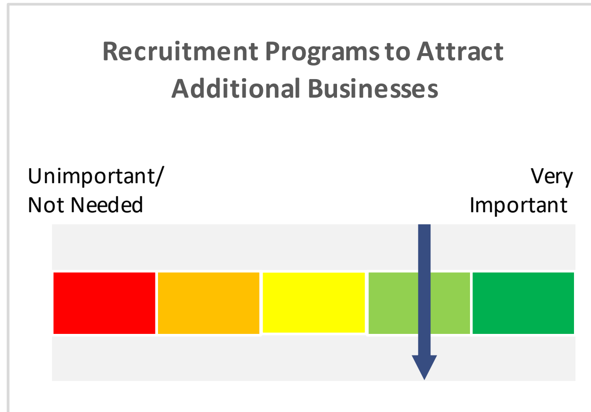


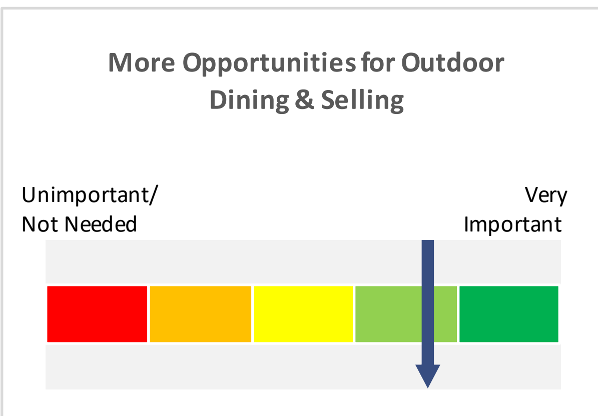
Business Input Related to Possible Strategies (cont'd)

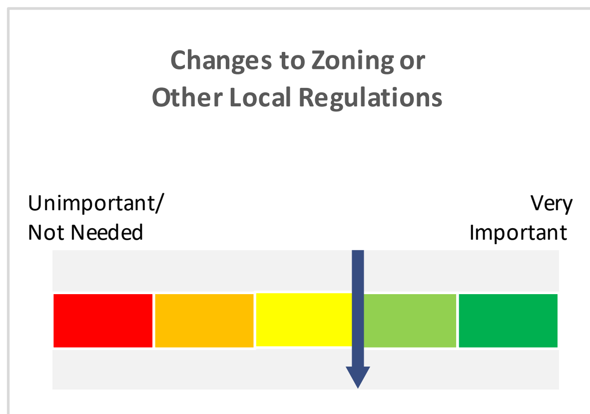
Attraction/Retention of Customers and Businesses

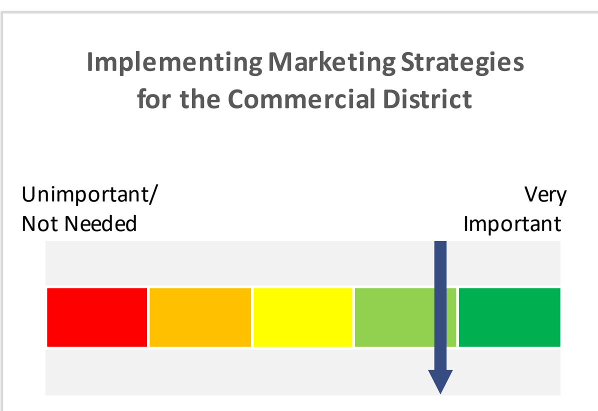
The charts below illustrate the average rating among respondents regarding importance of various strategies.

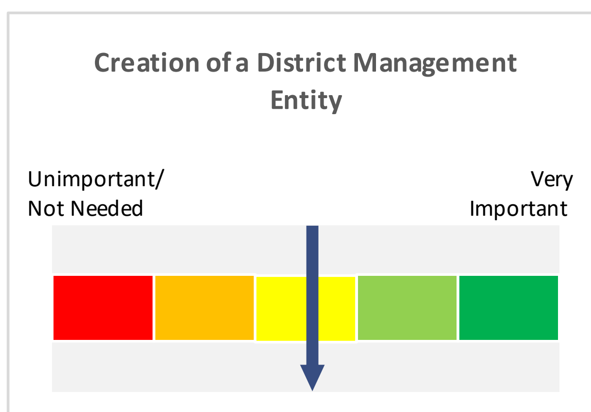








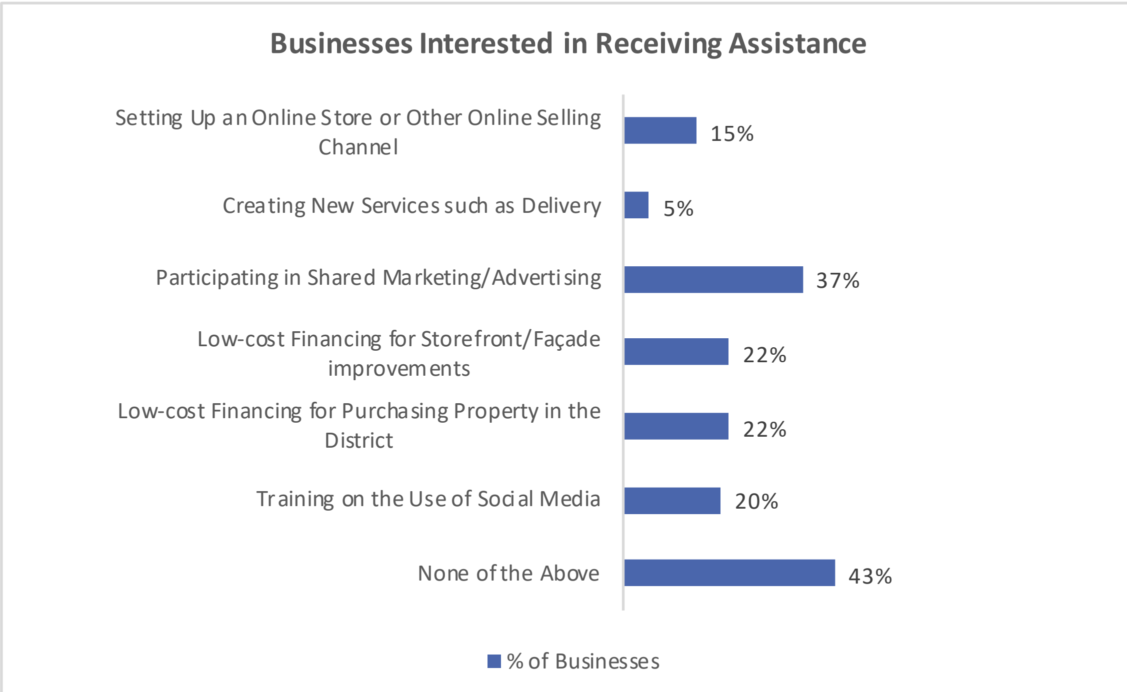




Business Input Related to Possible Strategies (cont'd)

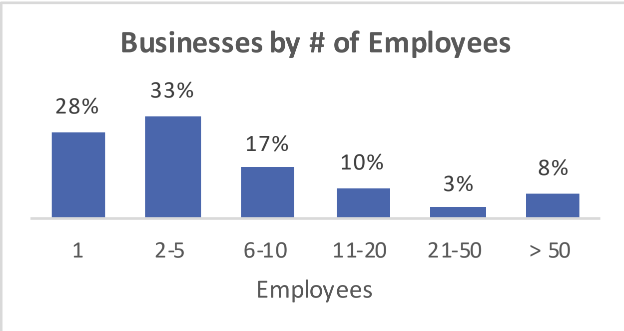
Businesses Support

57% of businesses expressed interest in receiving some kind of assistance.

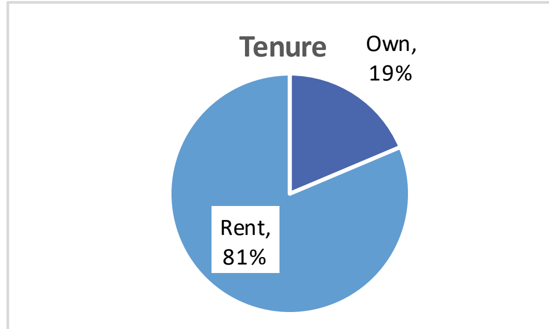


Business Characteristics

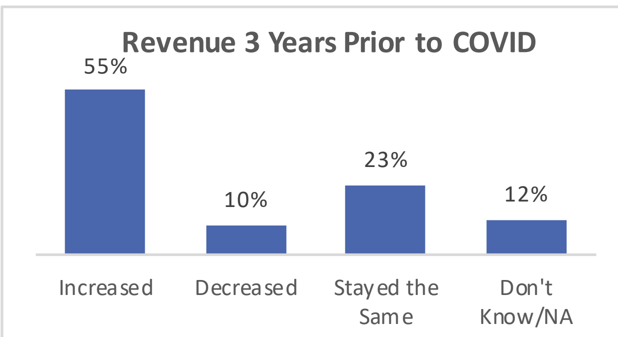
Business Size
61% of businesses are microenterprises (≤ 5 employees).

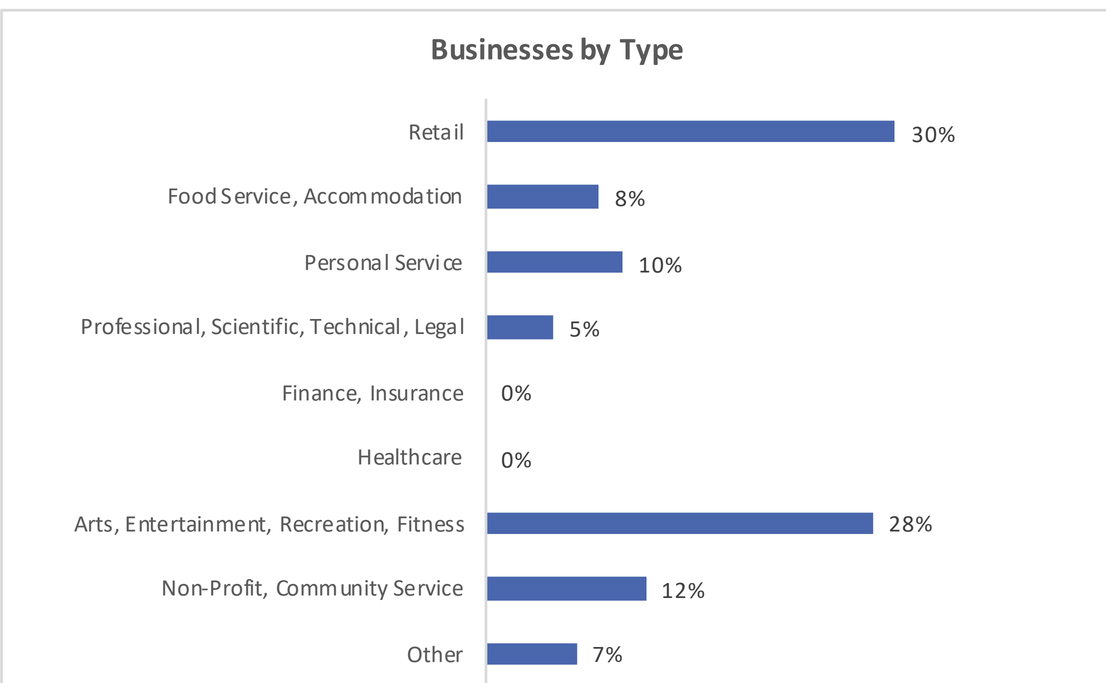


Business Tenure
81% of businesses rent their space.



Revenue Trend Prior to COVID
55% of businesses reported increase in revenue during the 3 years prior to COVID.





Community Where Targeted Downtown or Commercial District is Located

1. Please select the community where your business is located.

Barnstable	60

Business Characteristics & Satisfaction with Commercial Area

2. Including yourself, how many people did your business employ prior to COVID (February 2020), including both full-time and part-time?

1	17	28%
2 to 5	20	33%
6 to 10	10	17%
11 to 20	6	10%
21 to 50	2	3%
More than 50	5	8%
Total	60	100%

3. Does your business own or rent the space where it operates?

Own	11	19%
Rent	48	81%
Total	59	100%

4. During the 3 years prior to COVID, had your business revenue . . .?

Increased	33	55%
Decreased	6	10%
Stayed about the Same	14	23%
Don't Know/Not Applicable	7	12%
Total	60	100%

5. Please select the category that best fits your business.

Retail (NAICS 44-45)	18	30%
Food Service (restaurants, bars), Accommodation (NAICS 72)	5	8%
Personal Service (hair, skin, nails, dry cleaning) (NAICS 81)	6	10%
Professional Scientific, Technical, Legal (NAICS 54)	3	5%
Finance, Insurance (NAICS 52)	0	0%
Healthcare (medical, dental, other health practitioners) (NAICS 62)	0	0%
Arts, Entertainment, Recreation, Fitness (NAICS 71)	17	28%
Non-Profit, Community Services	7	12%
Other	4	7%
Total	60	100%

6. Please rate your satisfaction with the following aspects of the Downtown or Commercial District where your business is located.

Condition of public spaces, streets, sidewalks

Very Dissatisfied	2	3%
Dissatisfied	5	8%
Neutral	11	18%
Satisfied	31	52%
Very Satisfied	11	18%
Total	60	100%

Condition of Private Buildings, Facades, Storefronts, Signage

Very Dissatisfied	3	5%
Dissatisfied	18	30%
Neutral	11	18%
Satisfied	22	37%
Very Satisfied	6	10%
Total	60	100%

Access for Customers & Employees

Very Dissatisfied	4	7%
Dissatisfied	7	12%
Neutral	15	25%
Satisfied	25	42%
Very Satisfied	9	15%
Total	60	100%

Safety and Comfort of Customers & Employees

Very Dissatisfied	4	7%
Dissatisfied	10	17%
Neutral	16	27%
Satisfied	22	37%
Very Satisfied	8	13%
Total	60	100%

Proximity to Complementary Businesses or Uses

Very Dissatisfied	0	0%
Dissatisfied	3	5%
Neutral	13	22%
Satisfied	32	54%
Very Satisfied	11	19%
Total	59	100%

7. Do any local regulations (not related to COVID) pose an obstacle to your business operation?

Licensing or permitting regulations	12	20%
Signage regulations	12	20%
Parking regulations	12	20%
Outdoor dining or selling regulations	8	14%
Allowed uses, change of use or other zoning regulations	8	14%
Historic District regulations	7	12%
Other regulations (not related to COVID)	5	8%
None - No Issues with regulations	32	54%

Impacts of COVID

8. Did your business experience any of the following due to COVID? Select All that apply.

Decline in revenue	41	68%
Employee layoff	17	28%
Reduced operating hours/capacity	37	62%
Business closure (temporary or permanent)	29	48%
Stopped/deferred rent or mortgage payments	11	18%
Incurred expense to implement safety measures	32	53%
Established alternative mode to sell and deliver products (on-line platforms, delivery, etc.)	26	43%
None of the Above	5	8%

9. How did your 2020 business revenue compare to your 2019 revenue?

Increased compared to 2019	8	13%
Stayed about the same as 2019	6	10%
Decreased 1 – 24% compared to 2019	14	23%
Decreased 25 – 49% compared to 2019	14	23%
Decreased 75 - 100% compared to 2019	6	10%
Decreased 50 – 74% compared to 2019	5	8%
Don't Know/Not Applicable	7	12%
Total	60	100%

10. Please estimate how the number of customers that physically came to your business in January and February 2021 compares to before COVID.

More customers than before COVID	4	7%
About the same number as before COVID	9	15%
1 – 24% less customers than before COVID	4	7%
25 – 49% less customers than before COVID	11	18%
50 – 74% less customers than before COVID	8	13%
75 – 100% less customers than before COVID	5	8%
Don't Know/Not Applicable	19	32%
Total	60	100%

11. At the current time, what is the status of your business operation?

Operating at full capacity	21	36%
Operating at reduced hours/capacity due to COVID	29	49%
Temporarily closed due to COVID	9	15%
Permanently closed due to COVID	0	0%
Total	59	100%

Strategies for Supporting Businesses and Improving the Commercial District

12. A few approaches to address <u>Physical Environment, Atmosphere and Access</u> in commercial districts are listed below. Considering the conditions in your commercial area, in your opinion, how important are each of the following strategies?

Renovation of Storefronts/Building Facades

Unimportant/Not Needed	1	2%
Of Little Importance or Need	5	9%
Moderately Important	10	17%
Important	24	41%
Very Important	18	31%
Total	58	100%

Improvement/Development of Public Spaces & Seating Areas

Unimportant/Not Needed	1	2%
Of Little Importance or Need	2	3%
Moderately Important	10	17%
Important	23	40%
Very Important	22	38%
Total	58	100%

Improvement of Streetscape & Sidewalks

Unimportant/Not Needed	2	4%
Of Little Importance or Need	1	2%
Moderately Important	11	19%
Important	23	40%
Very Important	20	35%
Total	57	100%

Improvements in Safety and/or Cleanliness

Unimportant/Not Needed	3	5%
Of Little Importance or Need	2	3%
Moderately Important	4	7%
Important	22	38%
Very Important	27	47%
Total	58	100%

Changes in Public Parking Availability, Management or Policies

Unimportant/Not Needed	2	3%
Of Little Importance or Need	6	10%
Moderately Important	13	22%
Important	13	22%
Very Important	24	41%
Total	58	100%

Amenity Improvements for Public Transit Users and/or Bike Riders

Unimportant/Not Needed	8	14%
Of Little Importance or Need	10	17%
Moderately Important	14	24%
Important	11	19%
Very Important	15	26%
Total	58	100%

13. A few approaches to address Attraction and Retention of Customers and Businesses in commercial districts are listed below. Considering the conditions in your commercial area, in your opinion, how important are each of the following strategies?

More Cultural Events/Activities to Bring People into the District

Unimportant/Not Needed	2	3%
Of Little Importance or Need	3	5%
Moderately Important	13	22%
Important	20	34%
Very Important	21	36%
Total	59	100%

More Opportunities for Outdoor Dining and Selling

Unimportant/Not Needed	3	5%
Of Little Importance or Need	2	3%
Moderately Important	9	15%
Important	25	42%
Very Important	20	34%
Total	59	100%

Implementing Marketing Strategies for the Commercial District

Unimportant/Not Needed	2	3%
Of Little Importance or Need	1	2%
Moderately Important	10	17%
Important	24	41%
Very Important	22	37%
Total	59	100%

Recruitment Programs to Attract Additional Businesses

Unimportant/Not Needed	4	7%
Of Little Importance or Need	2	3%
Moderately Important	14	24%
Important	17	29%
Very Important	21	36%
Total	58	100%

Changes to Zoning or Other Local Regulations (not related to COVID)

Unimportant/Not Needed	4	7%
Of Little Importance or Need	12	21%
Moderately Important	14	24%
Important	12	21%
Very Important	16	28%
Total	58	100%

Creation of a District Management Entity (Business Improvement District or other organization)

Unimportant/Not Needed	14	24%
Of Little Importance or Need	5	9%
Moderately Important	13	22%
Important	16	28%
Very Important	10	17%
Total	58	100%

14. Are you interested in receiving assistance for your business in any of the following areas? Select All that Apply.

Setting up an online store or other online selling channel	9	15%
Creating new services such as delivery	3	5%
Participating in shared marketing/advertising	22	37%
Low-cost financing for storefront/façade improvements	13	22%
Low-cost financing for purchasing property in the commercial district	13	22%
Training on the use of social media	12	20%
None of the above	26	43%

15. Please list any specific suggestions or ideas for possible projects, programs or actions that could help support businesses and improve the commercial district. (Optional)

Comments

Bangkok Cuisine
The John F. Kennedy Hyannis Museum
Create play area for children/families (playground). More outdoor events (concerts) on village green at night.
Business assistance in direct way is key
We could use more activities and decor to bring people to the west end of Main Street
Kayak Cookies, Inc.
—
Need more public parking in the Hyannis downtown area
—
Use creativity to save more on street parking. Town could be more helpful when people approach them regarding starting or changing their businesses.
—
—
Allowing businesses to put more of the merchandise out on the street for sale and Increasing parking areas and times
—
—
Henderson Studio
—
—
—
—
More activities for families to spend more time within the business district.
Continued brainstorm
make more of an effort to help the homeless and get them off the streets
Love Live Local Inc

—
—
—
Town of Barnstable Planning & Development Department
—
—
Allowance for food trucks or something similar, to draw in customers, in applicable areas, to shop
Art walks. Have artists display work in windows, restaurants, and stores and Empty buildings on monthly basis. These Art walks would be lined with music and other entertainers.
We need to develop more housing for the homeless
Free limited-time parking
Cape cod times should help local businesses more
—
—
Seaporium
Plush & Plunder
—
Vendor sales, outdoor selling
Pedestrian only zone
Hire Stephen R. Karp to redevelop the district, otherwise you're wasting time and money.
I think having safe shelter for homeless people in is important. Having the homeless shelter within walking distance to the Hyannis Main Street tourist shopping district may not be the best choice.
Get back to having Open Street events, car shows and concerts
—
increased communication between town and business owners. decreased incidences of lewdness by homeless/loiterers (loud profanity, fighting, drugs, panhandling, public urination, etc)
J.P. Baxter House LLC
close Main St traffic in summer so people can feel safe to walk around & not worry about crossing street & get hit by cars- set up more outdoor seating -have activities to engage younger children
Get the homeless away from Hyannis Main St., fewer stabbings would be good for business.

Cape Cod Melody Tent needs to be open. Sixty thousand people bought tickets to shows in 2019
I clicked "not needed" to the previous question considering Hyannis Main Street already has a BID.
—
—
—
—
Fixing parking, better signage, safety, events, façades, all hugely important
Safety and seasonal/year around safety officers moving the homeless population off of Main Street Hyannis
Outreach for homeless population / shelter relocation, Increase available parking on main street within barrier design.
—

Business Summary

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

Data for all businesses in area	Barnstable To...
Total Businesses:	3,402
Total Employees:	40,861
Total Residential Population:	46,729
Employee/Residential Population Ratio (per 100 Residents)	87

	Businesses		Employees	
by SIC Codes	Number	Percent	Number	Percent
Agriculture & Mining	102	3.0%	482	1.2%
Construction	312	9.2%	1,298	3.2%
Manufacturing	75	2.2%	1,041	2.5%
Transportation	92	2.7%	1,417	3.5%
Communication	32	0.9%	662	1.6%
Utility	10	0.3%	66	0.2%
Wholesale Trade	83	2.4%	719	1.8%
Retail Trade Summary	788	23.2%	10,396	25.4%
Home Improvement	42	1.2%	884	2.2%
General Merchandise Stores	19	0.6%	897	2.2%
Food Stores	72	2.1%	1,137	2.8%
Auto Dealers, Gas Stations, Auto Aftermarket	88	2.6%	962	2.4%
Apparel & Accessory Stores	80	2.4%	752	1.8%
Furniture & Home Furnishings	68	2.0%	504	1.2%
Eating & Drinking Places	196	5.8%	3,777	9.2%
Miscellaneous Retail	223	6.6%	1,483	3.6%
Finance, Insurance, Real Estate Summary	312	9.2%	2,024	5.0%
Banks, Savings & Lending Institutions	32	0.9%	306	0.7%
Securities Brokers	52	1.5%	208	0.5%
Insurance Carriers & Agents	43	1.3%	290	0.7%
Real Estate, Holding, Other Investment Offices	185	5.4%	1,220	3.0%
Services Summary	1,267	37.2%	20,548	50.3%
Hotels & Lodging	52	1.5%	1,002	2.5%
Automotive Services	102	3.0%	408	1.0%
Motion Pictures & Amusements	109	3.2%	839	2.1%
Health Services	187	5.5%	6,747	16.5%
Legal Services	87	2.6%	373	0.9%
Education Institutions & Libraries	57	1.7%	2,211	5.4%
Other Services	673	19.8%	8,968	21.9%
Government	110	3.2%	2,159	5.3%
Unclassified Establishments	219	6.4%	49	0.1%
Totals	3,402	100.0%	40,861	100.0%

Date Note: Data on the Business Summary report is calculated using **Esri's Data allocation method** which uses census block groups to allocate business summary data to custom areas.

May 20, 2021

Business Summary

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	13	0.4%	67	0.2%
Mining	0	0.0%	0	0.0%
Utilities	4	0.1%	35	0.1%
Construction	338	9.9%	1,404	3.4%
Manufacturing	86	2.5%	790	1.9%
Wholesale Trade	79	2.3%	703	1.7%
Retail Trade	569	16.7%	6,438	15.8%
Motor Vehicle & Parts Dealers	77	2.3%	906	2.2%
Furniture & Home Furnishings Stores	40	1.2%	263	0.6%
Electronics & Appliance Stores	17	0.5%	193	0.5%
Bldg Material & Garden Equipment & Supplies Dealers	42	1.2%	884	2.2%
Food & Beverage Stores	68	2.0%	1,080	2.6%
Health & Personal Care Stores	38	1.1%	344	0.8%
Gasoline Stations	11	0.3%	56	0.1%
Clothing & Clothing Accessories Stores	102	3.0%	848	2.1%
Sport Goods, Hobby, Book, & Music Stores	41	1.2%	345	0.8%
General Merchandise Stores	19	0.6%	897	2.2%
Miscellaneous Store Retailers	87	2.6%	598	1.5%
Nonstore Retailers	27	0.8%	24	0.1%
Transportation & Warehousing	71	2.1%	1,235	3.0%
Information	74	2.2%	1,340	3.3%
Finance & Insurance	129	3.8%	811	2.0%
Central Bank/Credit Intermediation & Related Activities	33	1.0%	308	0.8%
Securities, Commodity Contracts & Other Financial	53	1.6%	213	0.5%
Insurance Carriers & Related Activities; Funds, Trusts &	43	1.3%	290	0.7%
Real Estate, Rental & Leasing	184	5.4%	1,156	2.8%
Professional, Scientific & Tech Services	259	7.6%	5,140	12.6%
Legal Services	89	2.6%	379	0.9%
Management of Companies & Enterprises	6	0.2%	115	0.3%
Administrative & Support & Waste Management & Remediation	157	4.6%	958	2.3%
Educational Services	73	2.1%	2,196	5.4%
Health Care & Social Assistance	270	7.9%	8,411	20.6%
Arts, Entertainment & Recreation	93	2.7%	956	2.3%
Accommodation & Food Services	258	7.6%	4,869	11.9%
Accommodation	52	1.5%	1,002	2.5%
Food Services & Drinking Places	206	6.1%	3,867	9.5%
Other Services (except Public Administration)	410	12.1%	2,029	5.0%
Automotive Repair & Maintenance	81	2.4%	306	0.7%
Public Administration	110	3.2%	2,159	5.3%
Unclassified Establishments	219	6.4%	49	0.1%
Total	3,402	100.0%	40,861	100.0%

Date Note: Data on the Business Summary report is calculated using **Esri's Data allocation method** which uses census block groups to allocate business summary data to custom areas.

May 20, 2021

Market Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

	Barnstable To...
Population Summary	
2000 Total Population	47,891
2010 Total Population	45,193
2020 Total Population	46,729
2020 Group Quarters	377
2025 Total Population	46,910
2020-2025 Annual Rate	0.08%
2020 Total Daytime Population	51,147
Workers	28,266
Residents	22,881
Household Summary	
2000 Households	19,648
2000 Average Household Size	2.38
2010 Households	19,225
2010 Average Household Size	2.33
2020 Households	19,692
2020 Average Household Size	2.35
2025 Households	19,731
2025 Average Household Size	2.36
2020-2025 Annual Rate	0.04%
2010 Families	12,191
2010 Average Family Size	2.84
2020 Families	12,407
2020 Average Family Size	2.87
2025 Families	12,396
2025 Average Family Size	2.87
2020-2025 Annual Rate	-0.02%
Housing Unit Summary	
2000 Housing Units	25,039
Owner Occupied Housing Units	59.8%
Renter Occupied Housing Units	18.7%
Vacant Housing Units	21.5%
2010 Housing Units	26,343
Owner Occupied Housing Units	54.7%
Renter Occupied Housing Units	18.3%
Vacant Housing Units	27.0%
2020 Housing Units	27,150
Owner Occupied Housing Units	57.4%
Renter Occupied Housing Units	15.1%
Vacant Housing Units	27.5%
2025 Housing Units	27,666
Owner Occupied Housing Units	56.4%
Renter Occupied Housing Units	14.9%
Vacant Housing Units	28.7%
Median Household Income	
2020	$67,495
2025	$70,786
Median Home Value	
2020	$414,269
2025	$480,526
Per Capita Income	
2020	$42,481
2025	$47,048
Median Age	
2010	47.3
2020	50.4
2025	50.9

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

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Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

	Barnstable To...
2020 Households by Income	
Household Income Base	19,692
<$15,000	7.4%
$15,000 - $24,999	7.0%
$25,000 - $34,999	9.3%
$35,000 - $49,999	10.7%
$50,000 - $74,999	20.1%
$75,000 - $99,999	12.0%
$100,000 - $149,999	16.6%
$150,000 - $199,999	6.6%
$200,000+	10.3%
Average Household Income	$100,776
2025 Households by Income	
Household Income Base	19,731
<$15,000	7.2%
$15,000 - $24,999	6.7%
$25,000 - $34,999	8.8%
$35,000 - $49,999	10.4%
$50,000 - $74,999	19.1%
$75,000 - $99,999	11.4%
$100,000 - $149,999	16.7%
$150,000 - $199,999	7.3%
$200,000+	12.3%
Average Household Income	$111,824
2020 Owner Occupied Housing Units by Value	
Total	15,586
<$50,000	1.2%
$50,000 - $99,999	0.3%
$100,000 - $149,999	1.6%
$150,000 - $199,999	3.1%
$200,000 - $249,999	6.1%
$250,000 - $299,999	11.9%
$300,000 - $399,999	23.3%
$400,000 - $499,999	16.8%
$500,000 - $749,999	18.9%
$750,000 - $999,999	7.8%
$1,000,000 - $1,499,999	3.6%
$1,500,000 - $1,999,999	1.3%
$2,000,000 +	4.0%
Average Home Value	$555,543
2025 Owner Occupied Housing Units by Value	
Total	15,615
<$50,000	0.8%
$50,000 - $99,999	0.2%
$100,000 - $149,999	1.0%
$150,000 - $199,999	1.9%
$200,000 - $249,999	4.0%
$250,000 - $299,999	8.7%
$300,000 - $399,999	19.6%
$400,000 - $499,999	17.2%
$500,000 - $749,999	23.6%
$750,000 - $999,999	11.0%
$1,000,000 - $1,499,999	5.1%
$1,500,000 - $1,999,999	1.6%
$2,000,000 +	5.3%
Average Home Value	$639,528

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

May 20, 2021

Market Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

	Barnstable To...
2010 Population by Age	
Total	45,193
0 - 4	4.6%
5 - 9	4.8%
10 - 14	5.3%
15 - 24	10.6%
25 - 34	9.7%
35 - 44	11.3%
45 - 54	17.0%
55 - 64	15.7%
65 - 74	10.5%
75 - 84	7.4%
85 +	3.1%
18 +	81.7%
2020 Population by Age	
Total	46,729
0 - 4	4.1%
5 - 9	4.6%
10 - 14	5.2%
15 - 24	8.8%
25 - 34	10.2%
35 - 44	10.8%
45 - 54	12.8%
55 - 64	17.8%
65 - 74	14.1%
75 - 84	7.9%
85 +	3.6%
18 +	83.2%
2025 Population by Age	
Total	46,910
0 - 4	4.1%
5 - 9	4.4%
10 - 14	4.9%
15 - 24	8.7%
25 - 34	9.6%
35 - 44	11.6%
45 - 54	11.7%
55 - 64	16.0%
65 - 74	15.8%
75 - 84	9.6%
85 +	3.6%
18 +	83.5%
2010 Population by Sex	
Males	21,780
Females	23,413
2020 Population by Sex	
Males	22,623
Females	24,106
2025 Population by Sex	
Males	22,787
Females	24,123

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

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Market Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

	Barnstable To...
2010 Population by Race/Ethnicity	
Total	45,193
White Alone	89.3%
Black Alone	3.0%
American Indian Alone	0.6%
Asian Alone	1.2%
Pacific Islander Alone	0.1%
Some Other Race Alone	2.7%
Two or More Races	3.1%
Hispanic Origin	3.1%
Diversity Index	25.0
2020 Population by Race/Ethnicity	
Total	46,729
White Alone	85.5%
Black Alone	5.1%
American Indian Alone	0.6%
Asian Alone	1.8%
Pacific Islander Alone	0.1%
Some Other Race Alone	3.1%
Two or More Races	3.8%
Hispanic Origin	4.9%
Diversity Index	33.4
2025 Population by Race/Ethnicity	
Total	46,910
White Alone	83.3%
Black Alone	6.2%
American Indian Alone	0.7%
Asian Alone	2.1%
Pacific Islander Alone	0.1%
Some Other Race Alone	3.4%
Two or More Races	4.3%
Hispanic Origin	6.0%
Diversity Index	38.0
2010 Population by Relationship and Household Type	
Total	45,193
In Households	99.2%
In Family Households	79.1%
Householder	27.0%
Spouse	20.7%
Child	25.7%
Other relative	3.3%
Nonrelative	2.5%
In Nonfamily Households	20.1%
In Group Quarters	0.8%
Institutionalized Population	0.2%
Noninstitutionalized Population	0.6%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

May 20, 2021

Market Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

	Barnstable To...
2020 Population 25+ by Educational Attainment	
Total	36,126
Less than 9th Grade	1.7%
9th - 12th Grade, No Diploma	3.7%
High School Graduate	23.5%
GED/Alternative Credential	2.2%
Some College, No Degree	19.0%
Associate Degree	9.5%
Bachelor's Degree	22.8%
Graduate/Professional Degree	17.7%
2020 Population 15+ by Marital Status	
Total	40,260
Never Married	28.2%
Married	51.7%
Widowed	6.0%
Divorced	14.0%
2020 Civilian Population 16+ in Labor Force	
Civilian Population 16+	28,616
Population 16+ Employed	84.0%
Population 16+ Unemployment rate	16.0%
Population 16-24 Employed	8.9%
Population 16-24 Unemployment rate	23.1%
Population 25-54 Employed	50.9%
Population 25-54 Unemployment rate	16.0%
Population 55-64 Employed	24.4%
Population 55-64 Unemployment rate	13.5%
Population 65+ Employed	15.8%
Population 65+ Unemployment rate	15.5%
2020 Employed Population 16+ by Industry	
Total	24,035
Agriculture/Mining	0.5%
Construction	13.0%
Manufacturing	4.1%
Wholesale Trade	2.3%
Retail Trade	9.7%
Transportation/Utilities	4.2%
Information	2.0%
Finance/Insurance/Real Estate	6.2%
Services	53.8%
Public Administration	4.1%
2020 Employed Population 16+ by Occupation	
Total	24,035
White Collar	58.4%
Management/Business/Financial	15.7%
Professional	21.3%
Sales	9.8%
Administrative Support	11.6%
Services	21.7%
Blue Collar	20.0%
Farming/Forestry/Fishing	0.4%
Construction/Extraction	9.5%
Installation/Maintenance/Repair	2.2%
Production	2.2%
Transportation/Material Moving	5.6%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

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Market Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

	Barnstable To...
2010 Households by Type	
Total	19,225
Households with 1 Person	29.0%
Households with 2+ People	71.0%
Family Households	63.4%
Husband-wife Families	48.7%
With Related Children	16.6%
Other Family (No Spouse Present)	14.7%
Other Family with Male Householder	4.1%
With Related Children	2.0%
Other Family with Female Householder	10.6%
With Related Children	6.1%
Nonfamily Households	7.6%
All Households with Children	25.1%
Multigenerational Households	2.8%
Unmarried Partner Households	6.4%
Male-female	5.4%
Same-sex	0.9%
2010 Households by Size	
Total	19,225
1 Person Household	29.0%
2 Person Household	37.7%
3 Person Household	15.1%
4 Person Household	11.3%
5 Person Household	4.6%
6 Person Household	1.7%
7 + Person Household	0.7%
2010 Households by Tenure and Mortgage Status	
Total	19,225
Owner Occupied	75.0%
Owned with a Mortgage/Loan	53.4%
Owned Free and Clear	21.6%
Renter Occupied	25.0%
2020 Affordability, Mortgage and Wealth	
Housing Affordability Index	92
Percent of Income for Mortgage	25.6%
Wealth Index	152
2010 Housing Units By Urban/ Rural Status	
Total Housing Units	26,343
Housing Units Inside Urbanized Area	91.3%
Housing Units Inside Urbanized Cluster	0.0%
Rural Housing Units	8.7%
2010 Population By Urban/ Rural Status	
Total Population	45,193
Population Inside Urbanized Area	95.0%
Population Inside Urbanized Cluster	0.0%
Rural Population	5.0%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

May 20, 2021

Market Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

	Barnstable To...
Top 3 Tapestry Segments	
1.	Exurbanites (1E)
2.	Silver & Gold (9A)
3.	Parks and Rec (5C)
2020 Consumer Spending	
Apparel & Services: Total $	$45,664,430
Average Spent	$2,318.93
Spending Potential Index	108
Education: Total $	$39,491,117
Average Spent	$2,005.44
Spending Potential Index	112
Entertainment/Recreation: Total $	$71,481,728
Average Spent	$3,629.99
Spending Potential Index	112
Food at Home: Total $	$114,828,351
Average Spent	$5,831.22
Spending Potential Index	109
Food Away from Home: Total $	$80,173,565
Average Spent	$4,071.38
Spending Potential Index	108
Health Care: Total $	$129,359,429
Average Spent	$6,569.14
Spending Potential Index	114
HH Furnishings & Equipment: Total $	$48,361,214
Average Spent	$2,455.88
Spending Potential Index	112
Personal Care Products & Services: Total $	$20,228,432
Average Spent	$1,027.24
Spending Potential Index	112
Shelter: Total $	$422,662,816
Average Spent	$21,463.68
Spending Potential Index	111
Support Payments/Cash Contributions/Gifts in Kind: Total $	$55,260,838
Average Spent	$2,806.26
Spending Potential Index	120
Travel: Total $	$55,702,601
Average Spent	$2,828.69
Spending Potential Index	117
Vehicle Maintenance & Repairs: Total $	$25,894,500
Average Spent	$1,314.98
Spending Potential Index	113

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.
Source: Consumer Spending data are derived from the 2017 and 2018 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

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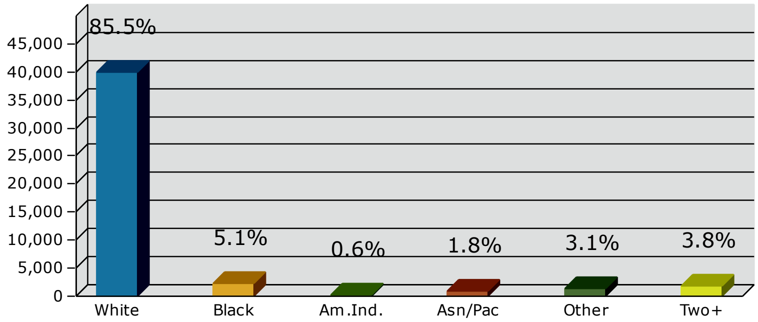
Graphic Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

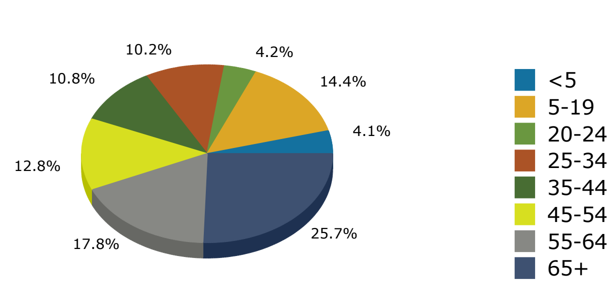
Downtown Hyannis, MA

2020 Population by Race

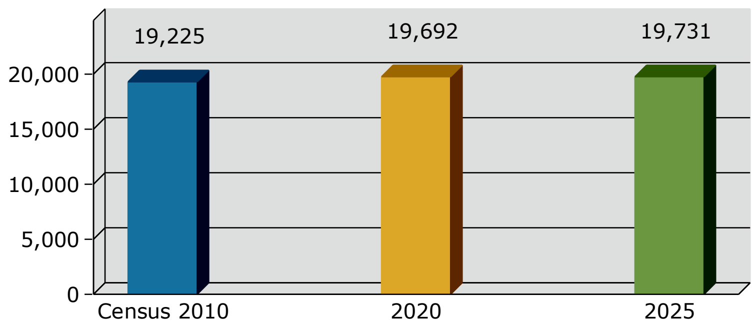


2020 Percent Hispanic Origin:4.9%

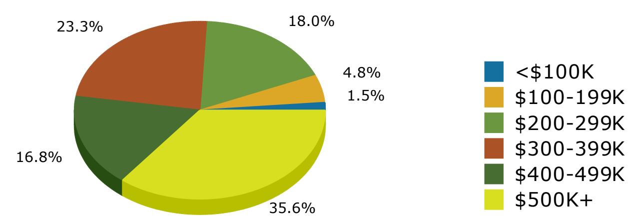
2020 Population by Age



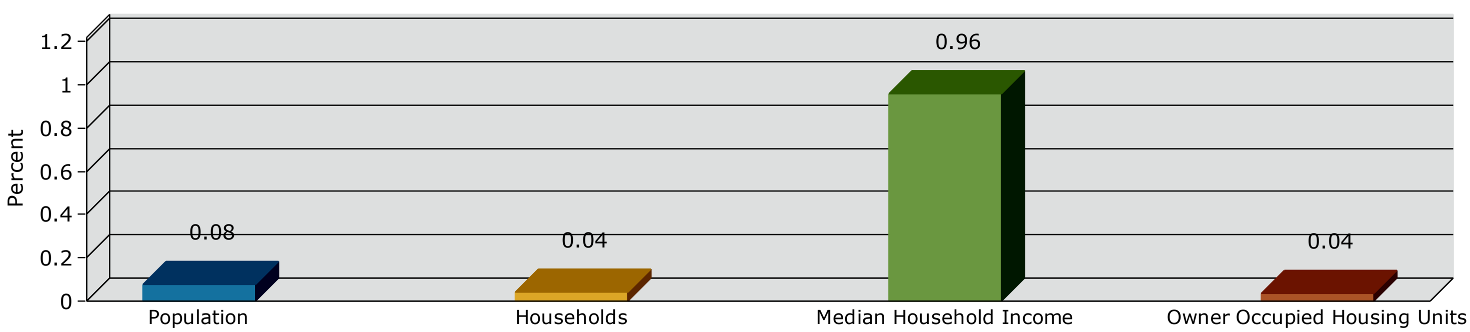
Households



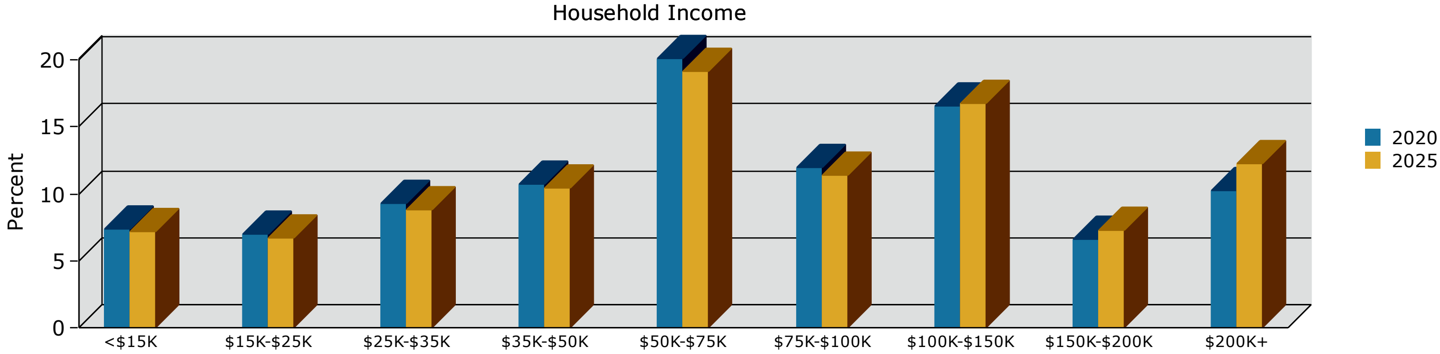
2020 Home Value



2020-2025 Annual Growth Rate



Household Income



Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025.

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Tapestry Segmentation Area Profile

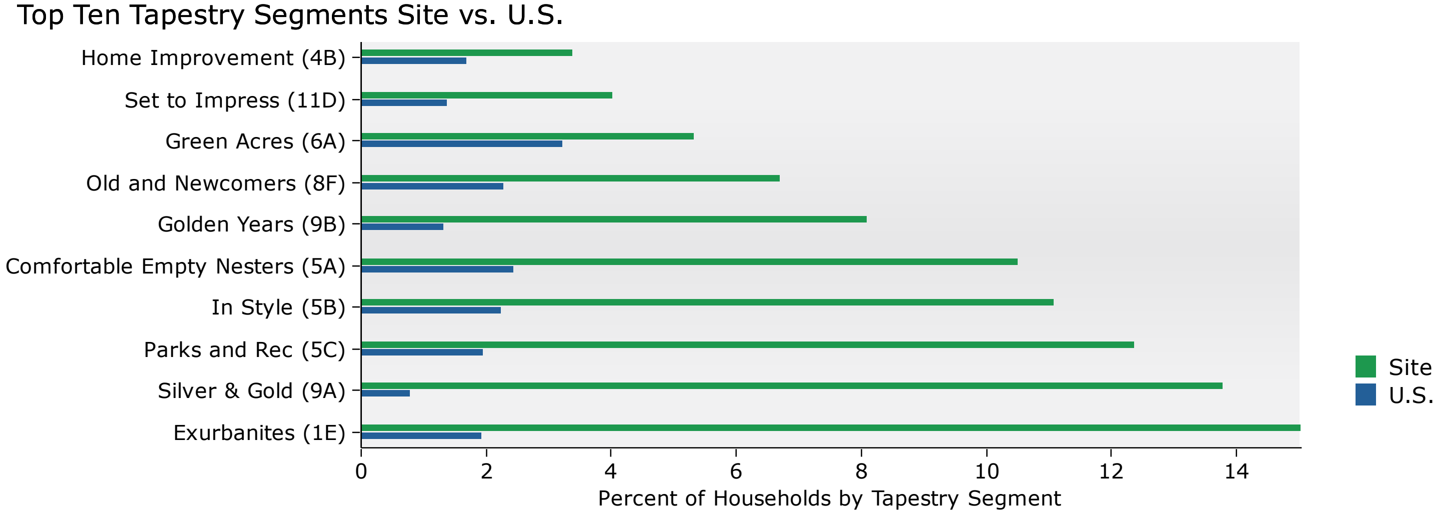
Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

Top Twenty Tapestry Segments

		2020 Households		2020 U.S. Households		
			Cumulative		Cumulative	
Rank	**Tapestry Segment**	**Percent**	**Percent**	**Percent**	**Percent**	**Index**
1	Exurbanites (1E)	15.0%	15.0%	1.9%	1.9%	776
2	Silver & Gold (9A)	13.8%	28.8%	0.8%	2.7%	1,751
3	Parks and Rec (5C)	12.4%	41.2%	2.0%	4.7%	631
4	In Style (5B)	11.1%	52.3%	2.2%	6.9%	495
5	Comfortable Empty Nesters (5A)	10.5%	62.8%	2.4%	9.3%	429
	Subtotal	**62.8%**		**9.3%**		
6	Golden Years (9B)	8.1%	70.9%	1.3%	10.6%	608
7	Old and Newcomers (8F)	6.7%	77.7%	2.3%	12.9%	292
8	Green Acres (6A)	5.3%	83.0%	3.2%	16.1%	165
9	Set to Impress (11D)	4.0%	87.0%	1.4%	17.5%	292
10	Home Improvement (4B)	3.4%	90.4%	1.7%	19.2%	199
	Subtotal	**27.5%**		**9.9%**		
11	The Great Outdoors (6C)	3.0%	93.4%	1.6%	20.8%	191
12	Pleasantville (2B)	2.8%	96.3%	2.1%	22.9%	133
13	Rural Resort Dwellers (6E)	2.4%	98.6%	1.0%	23.9%	231
14	Savvy Suburbanites (1D)	1.4%	100.0%	3.0%	26.9%	46
	Subtotal	**9.6%**		**7.7%**		
	Total	**100.0%**		**27.1%**		**370**

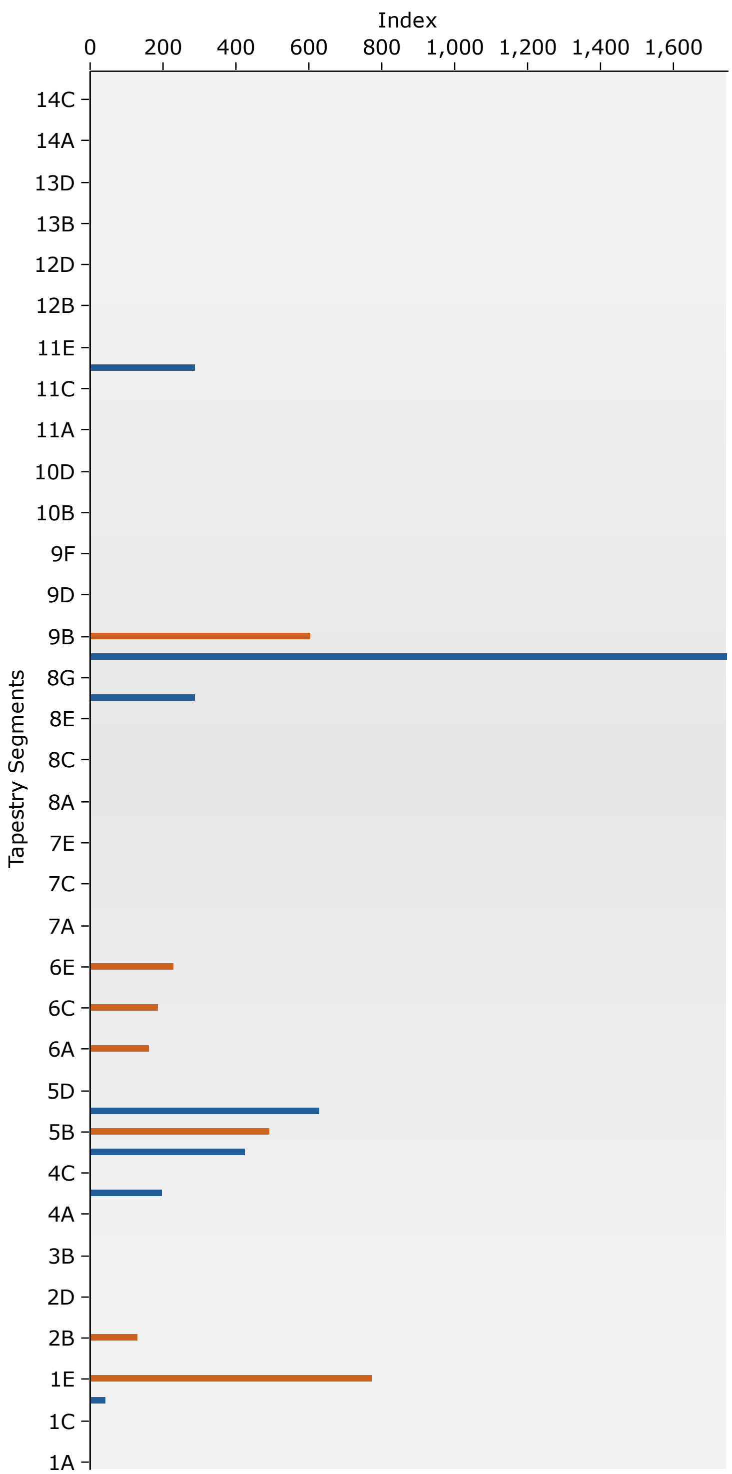
Top Ten Tapestry Segments Site vs. U.S.



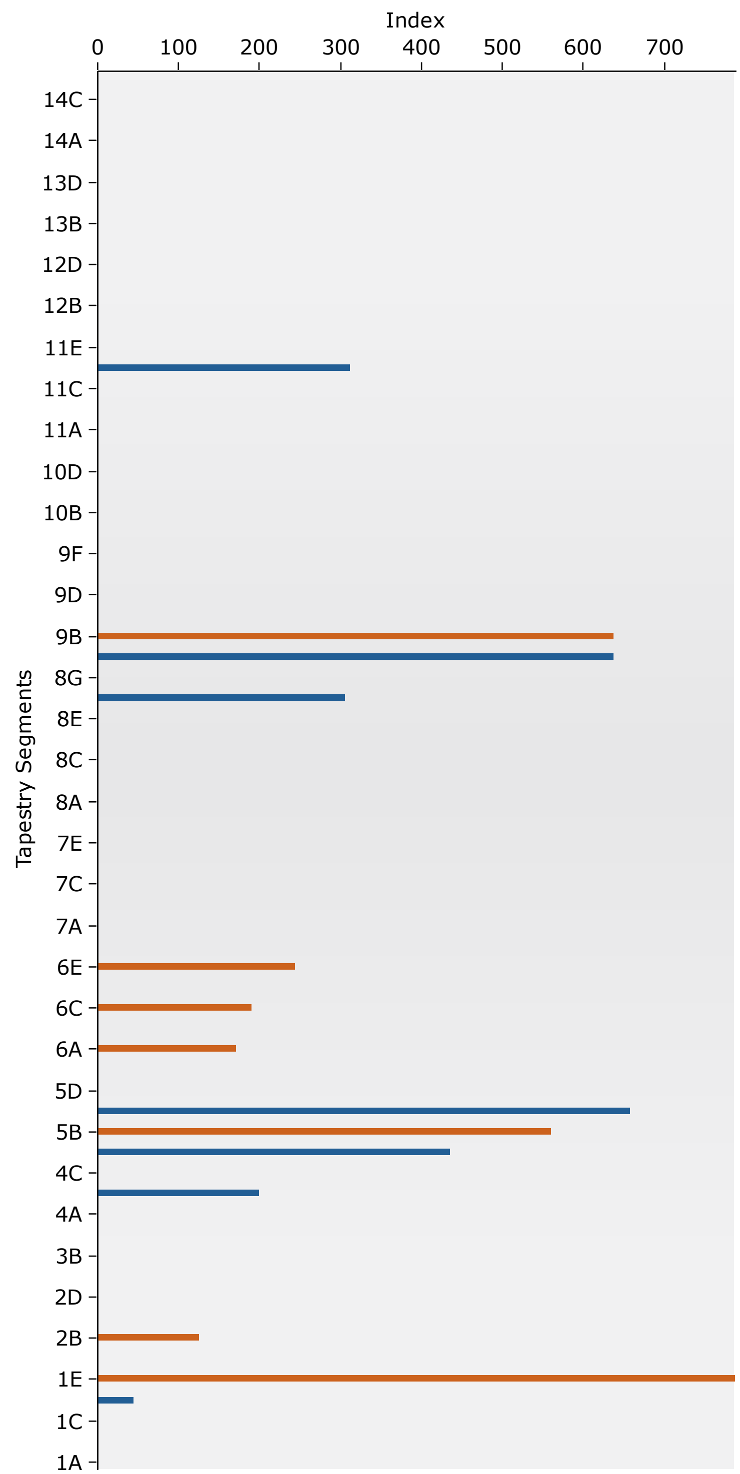
Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

May 20, 2021

2020 Tapestry Indexes by Households



2020 Tapestry Indexes by Total Population 18+



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

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Tapestry Segmentation Area Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

Tapestry LifeMode Groups	2020 Households			2020 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	19,692	100.0%		38,893	100.0%	
1. Affluent Estates	**3,232**	**16.4%**	**164**	**6,524**	**16.8%**	**157**
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	270	1.4%	46	570	1.5%	46
Exurbanites (1E)	2,962	15.0%	776	5,954	15.3%	789
2. Upscale Avenues	**561**	**2.8%**	**51**	**1,172**	**3.0%**	**52**
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	561	2.8%	133	1,172	3.0%	126
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
3. Uptown Individuals	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	**668**	**3.4%**	**45**	**1,434**	**3.7%**	**46**
Soccer Moms (4A)	0	0.0%	0	0	0.0%	0
Home Improvement (4B)	668	3.4%	199	1,434	3.7%	201
Middleburg (4C)	0	0.0%	0	0	0.0%	0
5. GenXurban	**6,696**	**34.0%**	**301**	**13,626**	**35.0%**	**323**
Comfortable Empty Nesters (5A)	2,070	10.5%	429	4,162	10.7%	437
In Style (5B)	2,186	11.1%	495	4,560	11.7%	561
Parks and Rec (5C)	2,440	12.4%	631	4,904	12.6%	659
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
6. Cozy Country Living	**2,106**	**10.7%**	**89**	**4,289**	**11.0%**	**93**
Green Acres (6A)	1,051	5.3%	165	2,246	5.8%	172
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	592	3.0%	191	1,148	3.0%	191
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	463	2.4%	231	895	2.3%	245
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
7. Ethnic Enclaves	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

May 20, 2021

Tapestry Segmentation Area Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

Tapestry LifeMode Groups	2020 Households			2020 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	19,692	100.0%		38,893	100.0%	
8. Middle Ground	**1,323**	**6.7%**	**62**	**2,357**	**6.1%**	**60**
City Lights (8A)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	1,323	6.7%	292	2,357	6.1%	306
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
9. Senior Styles	**4,312**	**21.9%**	**377**	**8,058**	**20.7%**	**414**
Silver & Gold (9A)	2,718	13.8%	1,751	5,137	13.2%	1,852
Golden Years (9B)	1,594	8.1%	608	2,921	7.5%	639
The Elders (9C)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	**794**	**4.0%**	**66**	**1,433**	**3.7%**	**68**
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	794	4.0%	292	1,433	3.7%	313
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

May 20, 2021

Tapestry Segmentation Area Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

Tapestry Urbanization Groups	2020 Households			2020 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	19,692	100.0%		38,893	100.0%	
1. Principal Urban Center	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	**4,303**	**21.9%**	**121**	**8,350**	**21.5%**	**128**
In Style (5B)	2,186	11.1%	495	4,560	11.7%	561
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	1,323	6.7%	292	2,357	6.1%	306
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	794	4.0%	292	1,433	3.7%	313
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

May 20, 2021

Tapestry Segmentation Area Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

Tapestry Urbanization Groups	2020 Households			2020 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	19,692	100.0%		38,893	100.0%	
4. Suburban Periphery	**13,283**	**67.5%**	**211**	**26,254**	**67.5%**	**206**
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	270	1.4%	46	570	1.5%	46
Exurbanites (1E)	2,962	15.0%	776	5,954	15.3%	789
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	561	2.8%	133	1,172	3.0%	126
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
Soccer Moms (4A)	0	0.0%	0	0	0.0%	0
Home Improvement (4B)	668	3.4%	199	1,434	3.7%	201
Comfortable Empty Nesters (5A)	2,070	10.5%	429	4,162	10.7%	437
Parks and Rec (5C)	2,440	12.4%	631	4,904	12.6%	659
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	2,718	13.8%	1,751	5,137	13.2%	1,852
Golden Years (9B)	1,594	8.1%	608	2,921	7.5%	639
The Elders (9C)	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Middleburg (4C)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
6. Rural	**2,106**	**10.7%**	**63**	**4,289**	**11.0%**	**65**
Green Acres (6A)	1,051	5.3%	165	2,246	5.8%	172
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	592	3.0%	191	1,148	3.0%	191
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	463	2.4%	231	895	2.3%	245
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

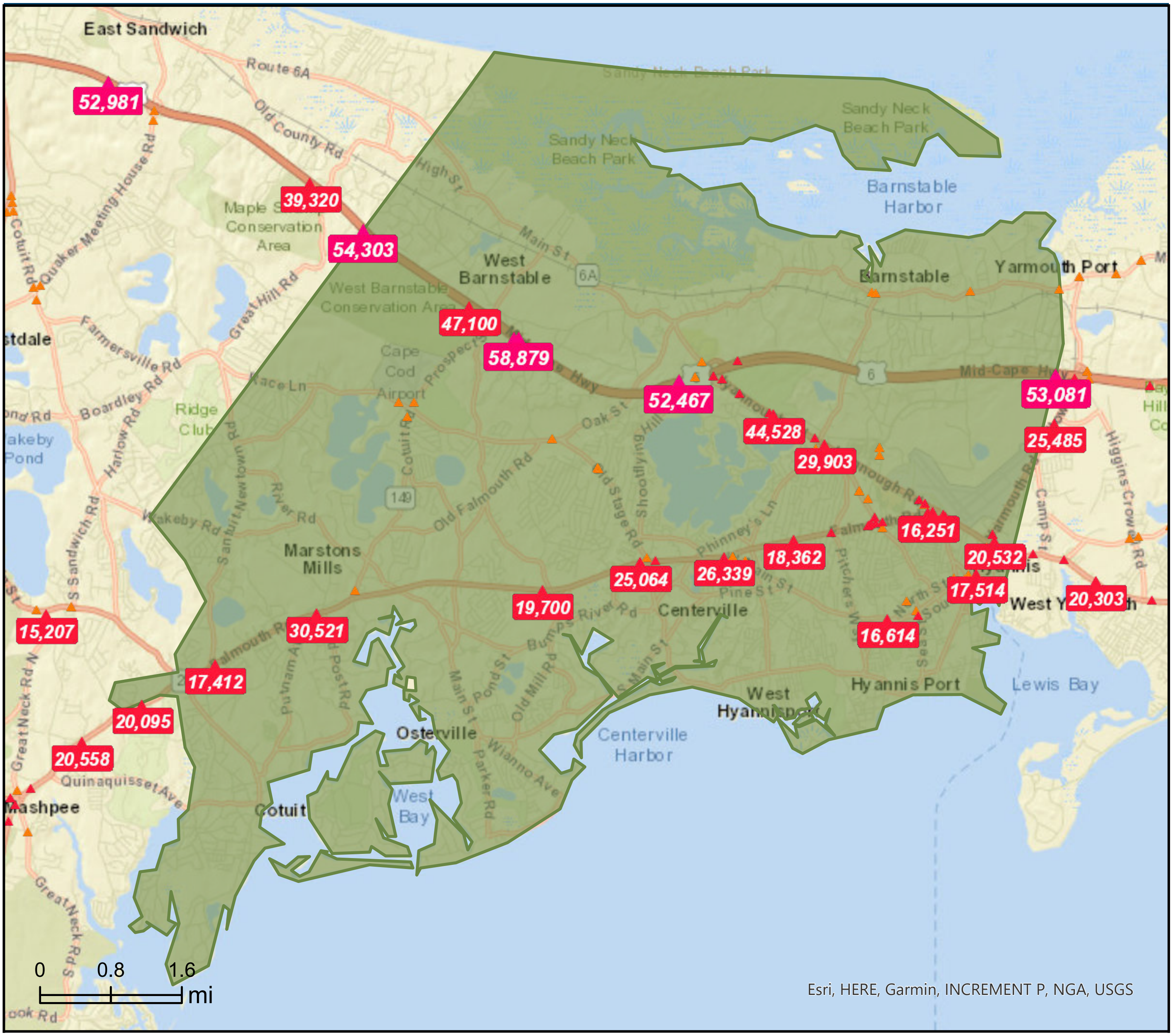
Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

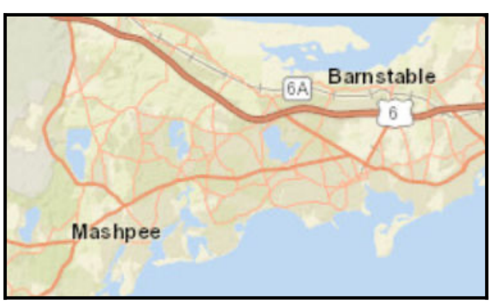
May 20, 2021

Traffic Count Map

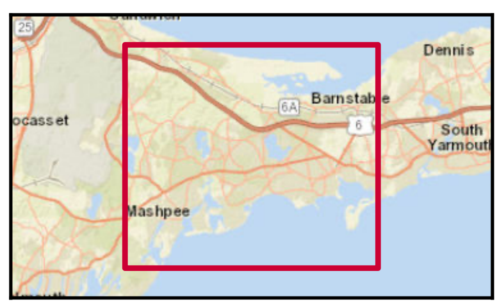
Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA





Average Daily Traffic Volume
- ▲ Up to 6,000 vehicles per day
- ▲ 6,001 - 15,000
- ▲ 15,001 - 30,000
- ▲ 30,001 - 50,000
- ▲ 50,001 - 100,000
- ▲ More than 100,000 per day



Source: ©2021 Kalibrate Technologies (Q1 2021).

May 20, 2021

esri

Traffic Count Profile

Barnstable Town City, MA
Barnstable Town City, MA (2503690)
Geography: Place

Downtown Hyannis, MA

Distance:	Street:	Closest Cross-street:	Year of Count:	Count:
0.11	Old Stage Road	Patriot Way (0.06 miles SE)	2018	12,146
0.11	Old Stage Rd	Patriot Way (0.06 miles SE)	2001	12,100
0.12	Old Stage Road	(0.0 miles)	2019	11,220
0.57	Monomoy Circle	Justice Douglas Way (0.05 miles N)	2018	313
0.60	Old Stage Road	Coach Light Rd (0.44999999 miles SE)	2018	14,479
0.60	Old Stage Rd	Coach Light Rd (0.44999999 miles SE)	2001	13,367
0.81	Oak Street	Mid-Cape Hwy (0.02 miles NE)	2018	3,669
0.81	Oak Street	Mid-Cape Hwy (0.02 miles NE)	2019	3,934
0.87	Stoney Cliff Road	Tuckernuck Rd (0.03 miles NW)	2018	209
0.89	Oak St	Mid-Cape Hwy (0.06 miles SW)	2002	3,347
0.97	Old Falmouth Rd	Walnut St (0.15000001 miles SW)	2001	2,870
1.15	Ames Way	Stoney Cliff Rd (0.03 miles NW)	2018	543
1.22	Old Stage Road	Camp Opechee Rd (0.0 miles NW)	2018	13,513
1.23	Nye Rd	Seth Parker Rd (0.15000001 miles N)	2018	1,400
1.23	Mid-Cape Hwy	Iyannough Rd (0.38999999 miles E)	2002	52,467
1.24	Falmouth Rd	Old Stage Rd (0.09 miles E)	2018	25,064
1.30	Falmouth Rd	Old Stage Rd (0.07 miles W)	2019	27,368
1.39	Service Rd	Shootflying Hill Rd (0.08 miles E)	2018	9,318
1.39		(0.0 miles)	2019	9,551
1.40	Fuller Road	(0.0 miles)	2018	658
1.40	Fuller Rd	(0.0 miles)	2000	1,032
1.42	Service Rd	Shootflying Hill Rd (0.08 miles SE)	2018	2,013
1.42		(0.0 miles)	2019	2,063
1.42	Old Post Rd	Molony Rd (0.13 miles NE)	2002	1,125
1.42	Old Post Road	Old Stage Rd (0.0 miles NW)	2018	651
1.52	Five Corners Road	Falmouth Rd (0.04 miles NE)	2018	1,703
1.54	Phinneys Ln	Falmouth Rd (0.05 miles SW)	2018	7,492
1.56	Iyannough Rd	Mid-Cape Hwy (0.04 miles N)	2018	27,393
1.56		(0.0 miles)	2019	30,544
1.56	Iyannough Rd	Mid-Cape Hwy (0.16 miles SE)	2018	8,319

Data Note: The Traffic Profile displays up to 30 of the closest available traffic counts within the largest radius around your site. The years of the counts in the database range from 2020 to 2000. Esri removes counts that are older than 2000 from the Kalibrate provided database. Traffic counts are identified by the street on which they were recorded, along with the distance and direction to the closest cross-street. Distances displayed as 0.00 miles (due to rounding), are closest to the site. A traffic count is defined as the two-way Average Daily Traffic (ADT) that passes that location.
Source: ©2021 Kalibrate Technologies (Q1 2021).

May 20, 2021

#116

COMPLETE

Collector:	Web Link 1 (Web Link)
Started:	Wednesday, May 19, 2021 10:19:02 PM
Last Modified:	Thursday, May 20, 2021 9:13:34 PM
Time Spent:	22:54:31
IP Address:	73.241.248.6

Page 1: Instructions to Plan Facilitators

Q1

Please select the community for which this data was collected.

Barnstable

Q2

Plan Facilitator

Name	**Michael Berne**
Company	**MJB Consulting**
Email Address	**mikeberne@consultmjb.com**
Phone Number	**9178168367**

Page 2

Q3

Average Annual Daily Vehicular Traffic - Primary Street within Study Area (2019 or earlier)Please submit highest recorded value for the street. If data is not available, please submit value as '0'.

17514

Q4

Please source the preceding data.If data is not available, please submit as 'N/A'

Mass DOT Traffic Volume (2019)

Q5

Please identify location of measurement (Latitude, Longitude)If data is not available, please submit value as '0'

0

Q6

Average Annual Daily Vehicular Traffic - Secondary Street within Study Area (2019 or earlier)Please submit highest recorded value for the street. If data is not available, please submit value as '0'.

12807

Q7

Please source the preceding data.If data is not available, please submit as 'N/A'

Mass DOT Traffic Volume (2019)

Q8

Please identify location of measurement (Latitude, Longitude)If data is not available, please submit value as '0'

0

Page 3

Q9

Total No. of Parking Spaces (On-Street and Off-Street)If data is not available, skip question.

4001

Q10

Please source the preceding data.

Town of Barnstable

Q11

Average Annual Daily Vehicular Traffic - Primary Street within Study Area (2020 or more recent)Please submit highest recorded value for the street or anecdotal information. If data is not available, skip question.

Respondent skipped this question

Q12

Please source the preceding data.

Respondent skipped this question

Q13

Please identify location of measurement (Latitude, Longitude)If data is not available, please submit value as '0'

Respondent skipped this question

Q14

Average Annual Daily Vehicular Traffic - Secondary Street within Study Area (2020 or more recent)Please submit highest recorded value for the street or anecdotal information. If data is not available, skip question.

Respondent skipped this question

Q15

Please source the preceding data.

Respondent skipped this question

Q16

Please identify location of measurement (Latitude, Longitude)If data is not available, please submit value as '0'

Respondent skipped this question

Q17

Average Annual Pedestrian Traffic - Primary Street within Study Area (2019 or earlier)Please submit highest recorded value for the street or anecdotal information. If data is not available, skip question.

Respondent skipped this question

Q18

Please source the preceding data.

Respondent skipped this question

Q19

Please identify location of measurement (Latitude, Longitude)If data is not available, please submit value as '0'

Respondent skipped this question

Q20

Average Annual Pedestrian Traffic - Secondary Street within Study Area (2019 or earlier)Please submit highest recorded value for the street or anecdotal information. If data is not available, skip question.

Respondent skipped this question

Q21

Please source the preceding data.

Respondent skipped this question

Q22

Please identify location of measurement (Latitude, Longitude)If data is not available, please submit value as '0'

Respondent skipped this question

Q23

Average Annual Pedestrian Traffic - Primary Street within Study Area (2020 or most recent)Please submit highest recorded value for the street or anecdotal information. If data is not available, skip question.

Respondent skipped this question

Q24

Please source the preceding data.

Respondent skipped this question

Q25

Please identify location of measurement (Latitude, Longitude)If data is not available, please submit value as '0'

Respondent skipped this question

Q26

Average Annual Pedestrian Traffic - Secondary Street within Study Area (2020 or most recent)Please submit highest recorded value for the street or anecdotal information. If data is not available, skip question.

Respondent skipped this question

Q27

Please source the preceding data.

Respondent skipped this question

Q28

Please identify location of measurement (Latitude, Longitude)If data is not available, please submit value as '0'

Respondent skipped this question

Page 4

Q29

SidewalkPlease report an RRP Grade based on guidelines provided.

A

Q30

Street Trees and BenchesPlease report an RRP Grade based on guidelines provided.

B

Q31

LightingPlease report an RRP Grade based on guidelines provided.

B

Q32

Wayfinding/SignagePlease report an RRP Grade based on guidelines provided.

B

Q33

Roadbed and Crosswalks Please report an RRP Grade based on guidelines provided.

B

Page 5

Q34

Total Open/Public Space Area (SF)Please include total square footage for permanent parks and plazas ONLY

Respondent skipped this question

Q35

Please source the preceding data.

Respondent skipped this question

Page 6

Q36

Total No. of StorefrontsIf data is not available, please submit value as '0'

0

Q37

Please source the preceding data. If data is not available, please submit as 'N/A'

N/A

Q38

Total Ground Floor Retail Space (SF)If data is not available, please submit value as '0'

0

Q39

Please source the preceding data. If data is not available, please submit as 'N/A'

N/A

Q40

Total Ground Floor Office Space (SF)If data is not available, please submit value as '0'

0

Q41

Please source the preceding data. If data is not available, please submit as 'N/A'

N/A

Q42

Total Ground Floor Manufacturing Space (SF)If data is not available, please submit value as '0'

0

Q43

Please source the preceding data. If data is not available, please submit as 'N/A'

N/A

Q44 Windows Please report an RRP Grade based on guidelines provided.	**A**
Q45 Outdoor Display/Dining Please report an RRP Grade based on guidelines provided.	**B**
Q46 SignagePlease report an RRP Grade based on guidelines provided.	**A**
Q47 AwningPlease report an RRP Grade based on guidelines provided.	**B**
Q48 LightingPlease report an RRP Grade based on guidelines provided.	**B**

Q49 FaçadesPlease report an RRP Grade based on guidelines provided.	**A**

Page 7

Q50 Total Resident Population (Current/2021 estimates)If data is not available, please submit value as '0'.	Municipality Study Area	**46729** **947**
Q51 Please source the preceding data for the Municipality.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**	
Q52 Please source the preceding data for the Study Area.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**	
Q53 Median Household Income (Current/2021 estimates)If data is not available, please submit value as '0'.	Municipality Study Area	**67495** **29683**
Q54 Please source the preceding data for the Municipality.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**	
Q55 Please source the preceding data for the Study Area.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**	
Q56 Median Age (Current/2021 estimates)If data is not available, please submit value as '0'.	Municipality Study Area	**504** **429**
Q57 Please source the preceding data for the Municipality.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**	

Q58 Please source the preceding data for the Study Area.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**
Q59 Average Household Size (Current/2021 estimates)If data is not available, please submit value as '0'.	Municipality **235** Study Area **153**
Q60 Please source the preceding data for the Municipality.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**
Q61 Please source the preceding data for the Study Area.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**
Q62 Population by Educational Attainment (Current/2021 estimates) - MunicipalityIf data is not available, please submit value as '0'.	Less than High School **1951** High School Graduate (or GED) **9284** Some College, no degree **689** Associate Degree **3432** Bachelor's Degree **8237** Master's/Professional School/Doctorate Degree **6394**
Q63 Please source the preceding data for the Municipality.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**
Q64 Population by Educational Attainment (Current/2021 estimates) - Study AreaIf data is not available, please submit value as '0'.	Less than High School **58** High School Graduate (or GED) **308** Some College, no degree **142** Associate Degree **66** Bachelor's Degree **122** Master's/Professional School/Doctorate Degree **57**
Q65 Please source the preceding data for the Study Area.If data is not available, please submit as 'N/A'	**ESRI Business Analyst Online**

Q66

Population by Age Distribution (Current/2021 estimates) - MunicipalityIf data is not available, please submit value as '0'.

Age 0 to 19	**8551**
Age 20 to 24	**2056**
Age 25 to 34	**4766**
Age 35 to 44	**5047**
Age 45 to 54	**5981**
Age 55 to 64	**8318**
Age 65 to 74	**6589**
Age 75 to 84	**3692**
Age 85 and over	**1682**

Q67

Please source the preceding data for the Municipality.If data is not available, please submit as 'N/A'

ESRI Business Analyst Online

Q68

Population by Age Distribution (Current/2021 estimates) - Study AreaIf data is not available, please submit value as '0'.

Age 0 to 19	**144**
Age 20 to 24	**51**
Age 25 to 34	**178**
Age 35 to 44	**122**
Age 45 to 54	**132**
Age 55 to 64	**145**
Age 65 to 74	**92**
Age 75 to 84	**63**
Age 85 and over	**18**

Q69

Please source the preceding data for the Study Area.If data is not available, please submit as 'N/A'

ESRI Business Analyst Online

Q70

Population by Race/Ethnicity (Current/2021 estimates) - MunicipalityIf data is not available, please submit value as '0'.

White Alone	**39953**
Black or African American Alone	**2383**
American Indian and Alaska Native Alone	**280**
Asian Alone	**841**
Native Hawaiian and Other Pacific Islander Alone	**47**
Some Other Race Alone	**1449**
Two or More Races	**1776**
Hispanic or Latino	**2290**
Not Hispanic or Latino	**6776**

Q71

Please source the preceding data for the Municipality.If data is not available, please submit as 'N/A'

ESRI Business Analyst Online

Q72

Population by Race/Ethnicity (Current/2021 estimates) - Study AreaIf data is not available, please submit value as '0'.

White Alone	**633**
Black or African American Alone	**130**
American Indian and Alaska Native Alone	**7**
Asian Alone	**43**
Native Hawaiian and Other Pacific Islander Alone	**0**
Some Other Race Alone	**65**
Two or More Races	**68**
Hispanic or Latino	**64**
Not Hispanic or Latino	**313**

Q73

Please source the preceding data for the Study Area.If data is not available, please submit as 'N/A'

ESRI Business Analyst Online

Q74

Total Workforce/Employees (2018 or more recent)If data is not available, please submit value as '0'.

Municipality	**40861**
Study Area	**10972**

Q75

Please source the preceding data for the Municipality.If data is not available, please submit as 'N/A'

Other,
If other sources were used, please specify.:
Data Axle Inc.

Q76

Please source the preceding data for the Study Area.If data is not available, please submit as 'N/A'

Other,
If other sources were used, please specify.:
Data Axle Inc.

Page 8

Q77

Total Secondary/Post Secondary Student Population (2019 or more recent)

Respondent skipped this question

Q78

Please source the preceding data for the Municipality.

Respondent skipped this question

Q79

Please source the preceding data for the Study Area.

Respondent skipped this question

Q80

Total Annual Visitors (2019 or more recent)

Respondent skipped this question

Q81

Please name the tourism asset/destination for which annual visitor data was previously provided.

Respondent skipped this question

Q82

Please source the preceding data.

Respondent skipped this question

Page 9

Q83

Total No. of Businesses (2020 or earlier) - Study AreaIf data is not available, please submit value as '0'.

11 Agriculture, Forestry, Fishing and Hunting	**0**
21 Mining	**0**
22 Utilities	**0**
23 Construction	**18**
31-33 Manufacturing	**9**
42 Wholesale Trade	**8**
44-45 Retail Trade	**80**
48-49 Transportation and Warehousing	**12**
51 Information	**10**
52 Finance and Insurance	**19**
53 Real Estate Rental and Leasing	**19**
54 Professional, Scientific, and Technical Services	**44**
55 Management of Companies and Enterprises	**0**
56 Administrative and Support and Waste Management and Remediation Services	**15**
61 Educational Services	**8**
62 Health Care and Social Assistance	**63**
71 Arts, Entertainment, and Recreation	**12**
72 Accommodation and Food Services	**57**
81 Other Services (except Public Administration)	**46**
92 Public Administration	**22**

Q84

Please source the preceding data.If data is not available, please submit as 'N/A'

Other,
If other sources were used, please specify.:
Data Axle Inc.

Q85

Total No. of Businesses (Current/2021 estimates) - Study AreaIf data is not available, please submit value as '0'.

11 Agriculture, Forestry, Fishing and Hunting	**0**
21 Mining	**0**
22 Utilities	**0**
23 Construction	**0**
31-33 Manufacturing	**0**
42 Wholesale Trade	**0**
44-45 Retail Trade	**0**
48-49 Transportation and Warehousing	**0**
51 Information	**0**
52 Finance and Insurance	**0**
53 Real Estate Rental and Leasing	**0**
54 Professional, Scientific, and Technical Services	**0**
55 Management of Companies and Enterprises	**0**
56 Administrative and Support and Waste Management and Remediation Services	**0**
61 Educational Services	**0**
62 Health Care and Social Assistance	**0**
71 Arts, Entertainment, and Recreation	**0**
72 Accommodation and Food Services	**0**
81 Other Services (except Public Administration)	**0**
92 Public Administration	**0**

Q86

Please source the preceding data.If data is not available, please submit as 'N/A'

N/A

Q87

Total No. of Estimated Business Closures (since March 2020) - Study AreaIf data is not available, please submit value as '0'.

11 Agriculture, Forestry, Fishing and Hunting	**0**
21 Mining	**0**
22 Utilities	**0**
23 Construction	**0**
31-33 Manufacturing	**0**
42 Wholesale Trade	**0**
44-45 Retail Trade	**8**
48-49 Transportation and Warehousing	**0**
51 Information	**0**
52 Finance and Insurance	**0**
53 Real Estate Rental and Leasing	**0**
54 Professional, Scientific, and Technical Services	**0**
55 Management of Companies and Enterprises	**0**
56 Administrative and Support and Waste Management and Remediation Services	**0**
61 Educational Services	**0**
62 Health Care and Social Assistance	**0**
71 Arts, Entertainment, and Recreation	**0**
72 Accommodation and Food Services	**0**
81 Other Services (except Public Administration)	**0**
92 Public Administration	**0**

Q88

Please source the preceding data.If data is not available, please submit as 'N/A'

Hyannis Main Street BID (for Retail Trade)

Q89

Total No. of Vacant Storefronts (Current/2021 estimates) - Study AreaIf data is not available, please submit value as '0'.

10

Q90

Please source the preceding data.If data is not available, please submit as 'N/A'

Hyannis Main Street BID

Q91

Average Asking Rent for Ground Floor Retail Space PSF (Current/2021 estimates) - Study AreaIf data is not available, please submit value as '0'.

0

Q92

Please source the preceding data.If data is not available, please submit as 'N/A'

Other,
If other sources were used, please specify.:
N/A

Q93

Average Asking Rent for Ground Floor Office Space PSF (Current/2021 estimates) - Study AreaIf data is not available, please submit value as '0'.

0

Q94

Please source the preceding data.If data is not available, please submit as 'N/A'

Other,
If other sources were used, please specify.:
N/A

Page 10

Q95

Total Ground Floor Commercial Vacant Space - including office, retail, manufacturing (Current/2021 estimates) - Study Area

Respondent skipped this question

Q96

Please source the preceding data.If data is not available, please submit as 'N/A'

Other,
If other sources were used, please specify.:
N/A

Page 11

Q97

Is there a viable organization acting as a steward for the study area?

Yes,
If yes, please name the organization(s).:
Hyannis Main Street Business Improvement District

Q98

Annual Budget of District Management Organization (if applicable)If data is not available, skip question.

300000.0

Page 12

Q99

Upload Photo 1 of your community

DTHyannisImage1.jpeg (319.6KB)

Q100

Upload Photo 2 of your community

DTHyannsImage2.jpeg (692.6KB)

Q101

Photo Credit

Town of Barnstable / Hyannis Main Street BID

Q102

Upload Photo 3 of your community

DTHyannisImage3.jpeg (326.7KB)

Q103

Photo Credit

Town of Barnstable / Hyannis Main Street BID

Q104

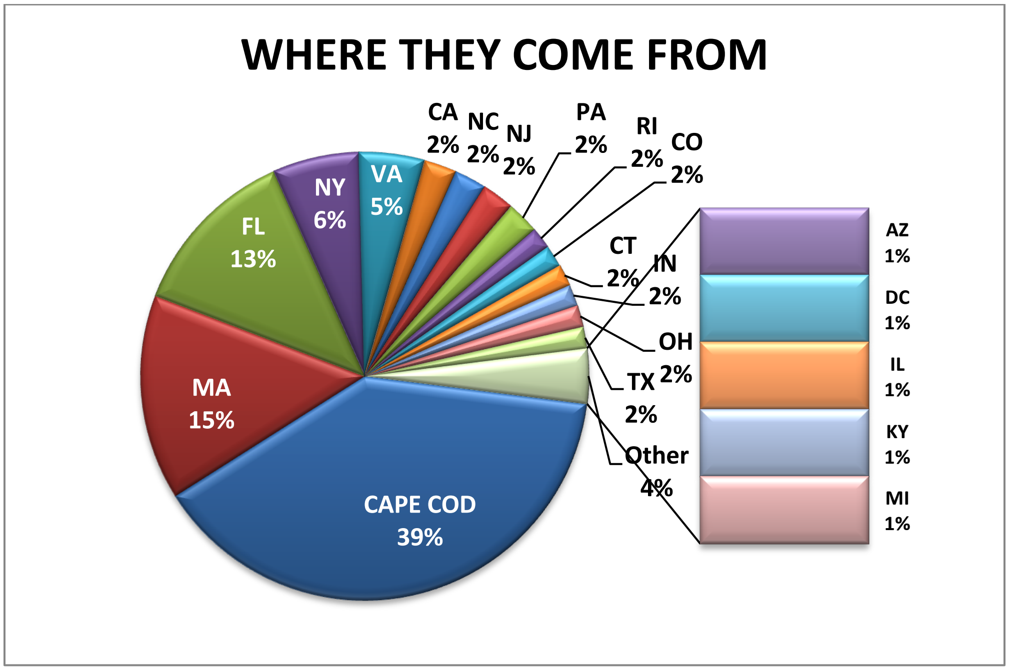
Photo Credit

Town of Barnstable / Hyannis Main Street BID

JULY 2021 INTERCEPT SURVEY – HYANNIS MAIN STREET

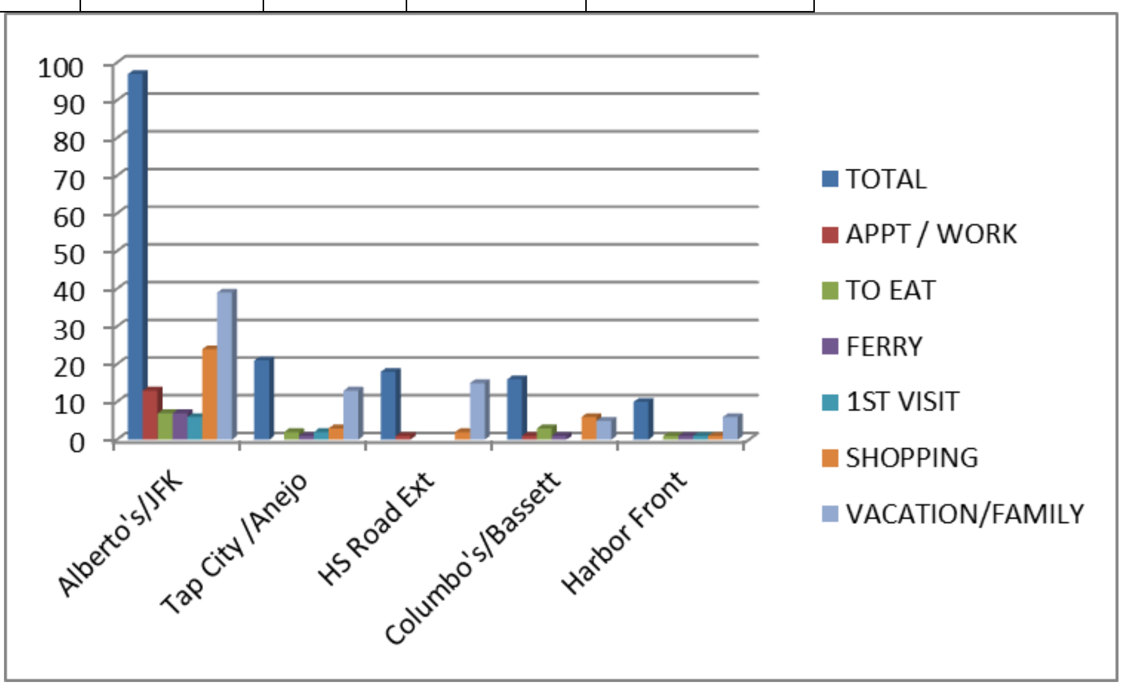
162 RESPONSES (111 visitors, 51 residents)

128 RESPONDED WITH THEIR ZIPCODE

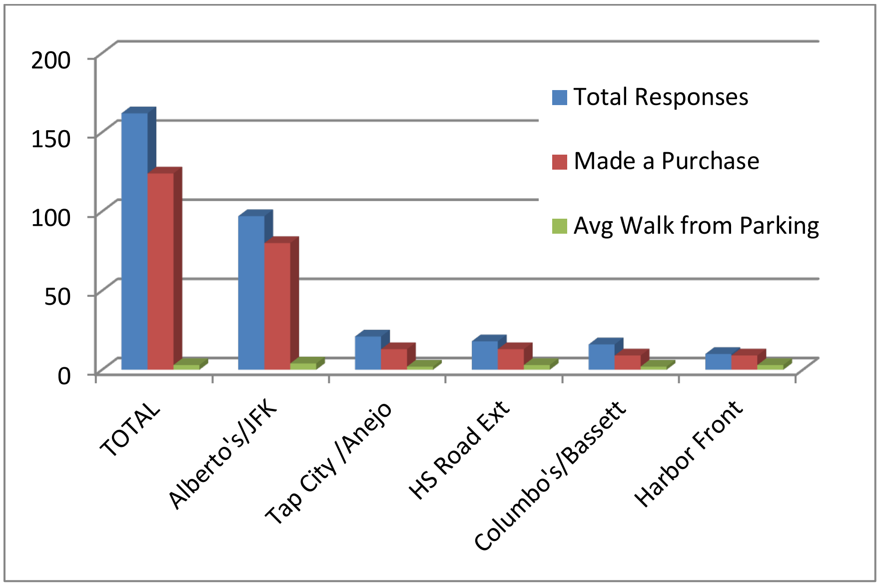


Most people that responded came to shop and be on vacation

6%	6%	9%	8%	22%	48%
FERRY	1ST VISIT	APPT / WORK	TO EAT	SHOPPING	VACATION/FAMILY



Average Walking Time from Parking Space: 4.25 minutes



THREE WORDS TO DESCRIBE HYANNIS

KINDS OF BUSINESSES THAT WOULD ATTRACT RESIDENTS

45 Residents replied.

Entertainment 27% (bowling alley, carousel, mini golf, karaoke, theater)

Service 22% (banks, car repair, massage, boarding house)

Retail 22% (Fabric Store, Weapons Store, men's and kids clothing)

Liquor/Wine Store 11%; Market/Fresh Food 9%; Restaurant/Bar 9%

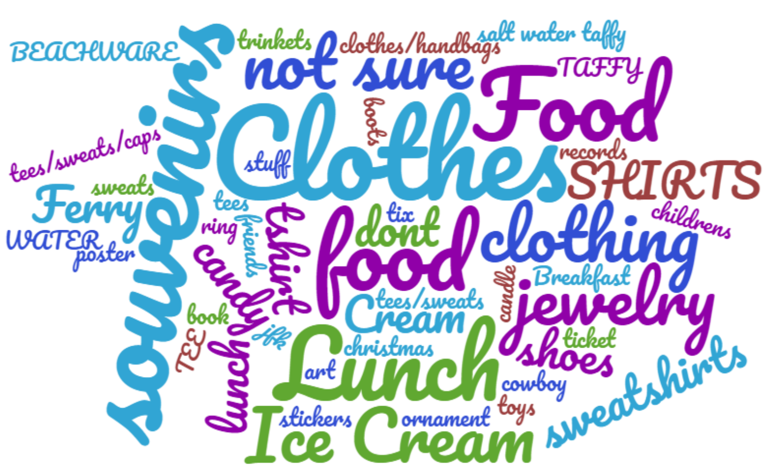
77% of Respondents made a Purchase.

WHAT CONSUMERS BOUGHT

Retail: 55% mostly clothing and souvenirs

Food: 32% ice cream and lunch/food

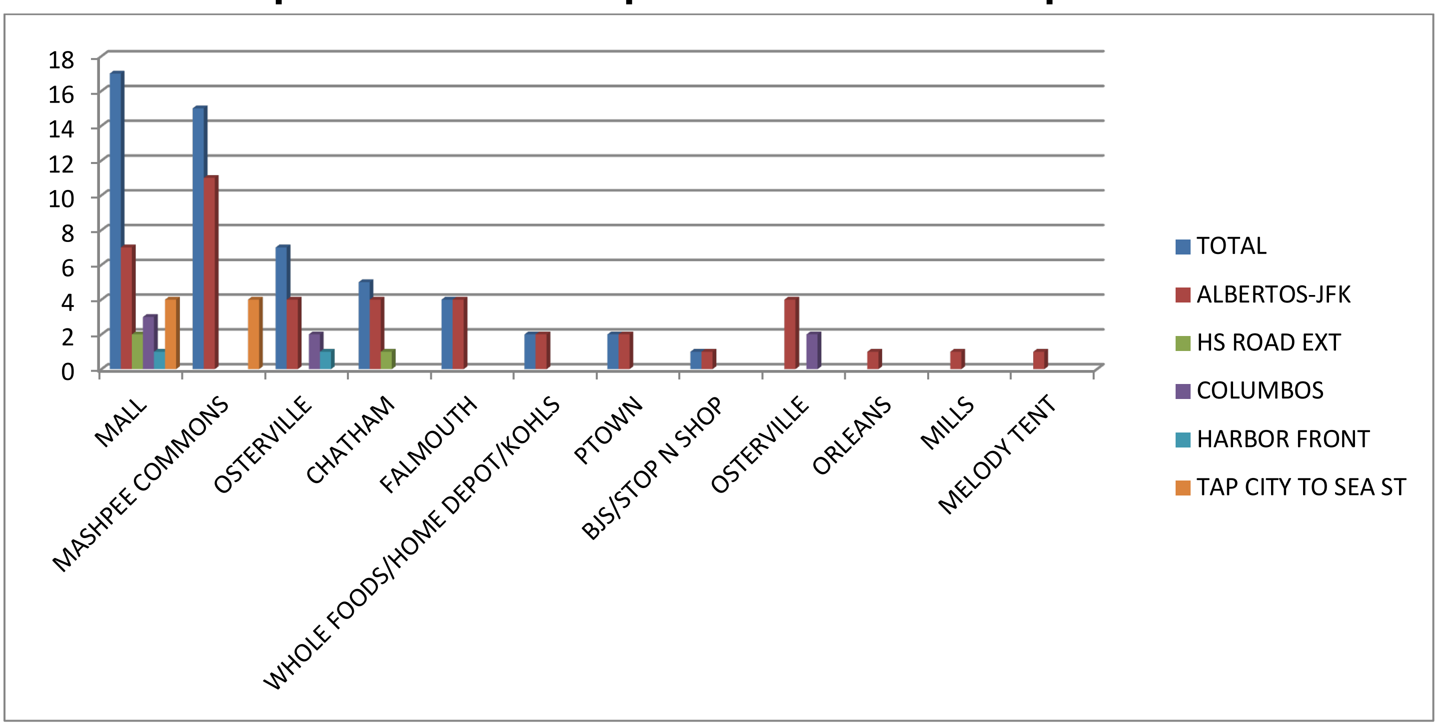
Unsure: 11% Travel: 2% ferry tickets



WHERE THEY BOUGHT

OTHER PLACES RESIDENTS SHOP

Cape Cod Mall and Mashpee Commons were the top choices.



WHERE THEY TYPICALLY SHOP FOR CLOTHING

(22%) said “pass” or “no opinion.” Surveyors reported that this was a tough question and respondents seemed confused and/or hesitant to answer.

•

A Retail Real Estate Consulting Firm

85 Fourth Avenue, Suite 6A
New York, New York 10003
Phone: 917-816-8367

2730 Forest Avenue, Suite W
Berkeley, California 94705
Phone: 510-356-4956

Memorandum

To:	Elizabeth Wurfbain Executive Director, Hyannis Main Street BID
From:	Michael J. Berne President, MJB Consulting
Re:	Executive Summary Memorandum – Draft #1 Main Street Hyannis – Retail Market Analysis and Positioning Strategy
Date:	July 11, 2019

In the fall of 2018, the Hyannis Main Street BID, with sponsorship from the Town of Barnstable as well as the Cape Cod Chamber of Commerce, the Cape Cod & Islands Association of Realtors, Cape Cod Five and the Resort and Conference Center at Hyannis, hired MJB Consulting (MJB) to undertake a retail[1] market analysis of and devise a positioning strategy for the stretch of Hyannis' Main Street from the West East Rotary to Yarmouth Road (hereafter referred to as the "study area").

Specifically, MJB was asked to analyze how the study area's retail mix could be positioned within the broader competitive marketplace and to identify what kinds of tenants would correspond to such positioning.

In order to develop its findings and conclusions, MJB undertook the following scope-of-work:

- Review of past studies and plans

[1] For the purposes of this analysis and memorandum, "retail" is to be understood as any business that accepts customers on a walk-in (or walk-up) basis, as opposed to appointment-only. It includes, then, traditional shops that sell goods as well as providers of personal (and some professional) services, food and beverage establishments as well as entertainment venues. An TD Bank branch would be considered a retailer, as would a Black Pearl Tattoo Studio & Gallery or a Dunkin' Donuts.

- Guided and self-guided citywide driving tour(s)
- Assessment of nearby competition
- Focus groups with Main Street merchants
- Conversations with retail brokers and experts
- Discussions with high-level Town officials
- Meeting with local neighborhood association
- Analysis of demographic and spending data

Also, in applying the firm's unique "total immersion" methodology, MJB's Principal, Michael J. Berne, spent roughly two weeks in the study area, including visits during shoulder season (October) as well as the winter doldrums (February). Michael is already quite familiar with the period of peak visitation, having spent 42 consecutive summers on the Cape.

Michael presented MJB's preliminary findings to an assemblage of stakeholders in May 2019 and their feedback has been integrated into this final version.

The following provides a summary of MJB's findings, starting with an introduction to some basic concepts and an explanation of the approach; offering some comments on Main Street's current identity; presenting a nuanced analysis of the relevant submarkets, along with corresponding retail categories; arriving at an overall positioning strategy; discussing what it means for both visitors and residents; and finishing with an outline of next steps.

Concepts

- "**Market positioning**" refers to how a particular commercial corridor is -- or can be -- *positioned* in the marketplace in terms of the demographics of its core customer(s), the skew of its foot traffic (i.e. seasonal versus year-round, weekday versus weekend, daytime versus evening), the product mix and price point of its businesses, the size and tenure of its tenants (i.e. start-up entrepreneurs, versus small local "chain-lets", versus large national brands), etc.

- While there might be a strong desire to proceed immediately to implementation and recruitment, we firmly believe that this analytical exercise must come first. If we want to change a retail mix, we need to agree on what we want to change it *to*, and that must be grounded in what we can *realistically* change it to. Otherwise, we will either be spinning our wheels or begetting a random assortment of businesses that do not help one another.

Our competitors, savvy shopping-center developers like Simon Property Group (Cape Cod Mall) and WS Development (the future Landing at Hyannis), have long done the opposite, carefully selecting and locating their retailers so as to maximize the likelihood that one, when a customer leaves one shop, she will find others which interest her, and two, when that customer thinks of a center, she can immediately grasp what it is, who it targets and whether she would belong.

With such an identifiable cluster of complementary businesses, that center, in turn, becomes more compelling to other prospective tenants. Generally speaking, retailers are drawn to projects and corridors with a number of existing businesses that attract a similar customer and thereby generate relevant cross-traffic, as such "**co-tenancies**" are thought to mitigate risk (i.e. "safety-in-numbers") and typically result in higher sales volumes than a standalone location.

Consider the typical fast-food eatery: it gravitates to mall food courts, and to intersections and corridors, where there are other fast-food eateries. This might seem counter-intuitive – to open in the vicinity of one's direct competitors – but the restaurateur knows that this is where *you*, the customer, will head when you are hungry, and it wants to be there when you do. Indeed, the same logic explains clustering in furniture stores, in antique dealers, in art galleries (see image below), etc.

Why are there so many art galleries in Provincetown? Partly because there are so many art galleries in Provincetown. That's the appeal of co-tenancy: art dealers want to be where art dealers already are.

Developers of shopping centers are able to leverage the appeal of co-tenancy because they typically own and manage 100% of the retail space. Of course, BID's and municipalities do not enjoy that sort of site control. And the multiple property owners on a Main Street might not agree on a cohesive vision, nor, for that matter, even see the need for one. After all, landlords and their brokers do not derive any benefit -- in the short term at least – from thinking beyond the spaces in their respective portfolios.

Take, for example, the case of 529 Main Street. The owner of that building originally tried to backfill the space with Dollar Tree. A large national chain, it would likely have delivered for both the landlord and the broker: that its presence might not have helped to elevate Main Street's retail mix and customer draw more broadly was of comparatively little consequence to them, as their bottom lines would not have been affected either way.

Partly for this reason, Main Street settings will never be able to compete on a truly level playing field with shopping centers. A BID, however, can roughly approximate the role of the developer by: 1) convening landlords, brokers and merchants; 2) making the case to them for a specific market positioning; and 3) providing whatever support to them that might be needed for its realization. Our charge with this memorandum is to provide the *what* and the *why* for (2).

Realistic market positioning is important, however, not just as a guide for tenanting and coordinated action; it must also inform broader marketing and branding efforts. In the absence of such alignment, visitors will arrive with certain expectations that are ultimately not met, leaving them confused and frustrated if not betrayed, unlikely ever to return. (For this reason, we are coordinating with NAIL, the creative agency working with the Town of Barnstable, on findings and recommendations).

- Finally, we want to underscore the relatively narrow focus of our scope-of-work and this memorandum. Designed as an essential phase one of a more extensive effort, the following is devoted largely to the matter of market positioning; it is not intended to serve as a comprehensive retail strategy, complete with recommendations on pedestrian experience, transport, beautification, events, etc., nor provide a blueprint for practical implementation or, for that matter, a list of specific prospects.

While we at MJB Consulting are eager to proceed to these later phases, they require additional funding that has yet to be secured. That said, we have outlined a series of "Next Steps", including other strategic imperatives that do not relate specifically to market positioning, in the last section of this memorandum. And we have underlined promising retail categories in our discussion of relevant submarkets, from which creatively-minded landlords, brokers and business proprietors can (should) be able to infer worthwhile leasing targets and merchandising tactics.

Approach and Assumptions

- With commercial corridor revitalization, one must accept from the outset that change does not happen with the wave of a magic wand. There is no one "silver bullet" that will solve everything. And there is no intentionality to outcomes, no "*they*" who is pulling the strings from on high. Rather, there is just a multiplicity of independent actors and unrelated variables that intersect in various ways to give rise to what exists right now.

Retail is more often the effect than the cause of these interactions; it is "downstream" from most everything else. It must wait for new submarkets to emerge and grow, for perceptions to shift, for leases to expire -- sometimes even for landlords to expire.

In efforts to elevate Main Street's retail mix, we should be guided by what will ultimately be possible -- by some mythical "end state" that reflects our aspirations and captures our imaginations. But at the same time, we must accept that revitalization is an evolutionary process which happens in stages, each corresponding to particular retail mixes and potentials. And we cannot leapfrog one to get to the next; rather, we must proceed sequentially, with deliberation and patience.

We must focus our energies and resources on simply getting to that next stage, on what we can become *now* as based on the realities that exist *today*. We must assume that the current actors and variables will remain in place, even if we hope that they will change, even if we are actively working on changing them. Because if we look too far ahead, we might never move forward at all.

Retailers, remember, cannot wait for that evolutionary process to happen, for the grand vision to become reality. They need to pay rent *now*. They need to meet payroll *now*. And so they need to generate sales *now*. If they cannot, if they are forced to close, the resulting "black eye" will halt whatever momentum has started to build.

This memorandum, then, will not provide *the* answer to the social-services population. Rather, we will base our recommendations on the assumption that *it is here to stay*, providing a sense of what sort of market positioning would be achievable – what kinds of businesses are most likely to be interested and ultimately sustainable -- in its presence. This should not be viewed as an endorsement of current conditions, but rather, a sensible approach to take in light of the uncertainties.

<u>What We Are And What We Are *Not* (Yet)</u>

- In order to understand what Main Street can become, we need to start with what it cannot, at least not yet. This might seem like an unnecessarily depressing exercise, but one that could help to avoid misdirection from the outset.

* A mass-market regional shopping destination: Main Street was at one time *the* place where Cape Codders would head for apparel (e.g. Filene's, Buettner's, C. Crawford Hodge) and general merchandise (e.g. Woolworth's, Grant's, Zayre's). Yet while it still contains a number of clothing boutiques today, most of the better-known retail brands long ago migrated to Route 132.

Main Street Hyannis, back in the day

* A quaint seaside village: Main Street cannot match the twee preciousness of classic Cape Cod settings like Chatham and Osterville. And while it might have at one point played its part in the "Camelot" mythology with fashionable shops like Peck & Peck, today it fails to deliver on expectations raised by its Kennedy association.

* A convenient place to run errands: Generally speaking, consumers tending to life's weekly and daily essentials – shopping for groceries, picking up medications, dropping off dry-cleaning, etc. – want to be able to do so as quickly and easily as possible. If they are driving, this typically implies ample in-front (or side) parking so as to allow for an "in-and-out" experience (see image below).

Site layout for the Star Market on West Main Street

In densely-populated cities like Boston and New York, convenience-driven businesses often do not have to provide for motorists because there are a sufficient number of potential customers living or working within walking distance. Even, however, if more rooftops materialize in and near Main Street in the coming years, Hyannis will still fall well short of such thresholds.

- What Main Street is, is very long. It runs roughly one mile from Yarmouth Road in the east to South Street in the west. For context, the rule-of-thumb among planners and urban designers is that the average pedestrian would only be willing to walk 0.25 (or, at most, 0.50) miles.

This means that Main Street cannot afford to focus on just one type of customer or retail category; rather, it needs to appeal to multiple submarkets and offer several different experiences. In other words, it must embrace the **diversity** that is Hyannis.

Such an approach does not necessarily detract from the brand. Take Provincetown, for instance: Commercial Street, stretching approximately 0.9 miles from Good Templar Place to Kiley Court, accommodates everything from high-priced art galleries to the tackiest of tee-shirt shops, with enough space so that the presence of the latter does not undermine the draw of the former.

Diversity of another kind, on Provincetown's Commercial Street

- The following provides nuance on Main Street's consumer profile. It is first segmented primarily in terms of demographics and psychographics[2], rather than the more common seasonal versus year-round dichotomy (which will be considered in greater detail later). In other words, each of the submarkets described below is composed of short-term visitors, second-home owners *and* full-time residents, in varying percentages.

A Word of Qualification

In trying to devise the consumer profile, we were challenged by the lack of hard data on the visitor population in Hyannis or the foot traffic along Main Street. The available information, such as it is, mostly concerns Barnstable County as a whole. As a result, we were forced to rely heavily on a qualitative approach involving observations and inferences. Ideally, our findings would be corroborated (or not) by more quantitative methodologies as well as pedestrian-intercept surveys, which we have recommended as one of the next steps.

---

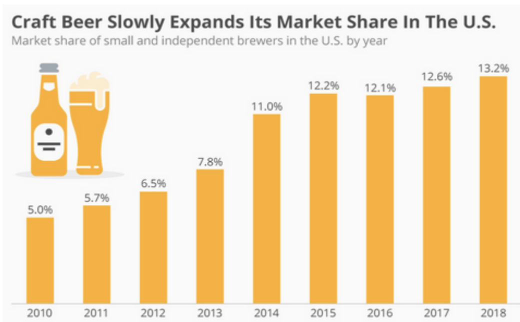
* **Mid-market** families, empty nesters and retirees represent the core customer(s) on Main Street. Middle-class homeowners, they are typically frugal but will spend on entertainment, on their kids (if in tow) and/or while on vacation. Their tastes can be characterized as mainstream or "Middle American". Importantly, they tend not to be online shoppers.

Representative businesses include Mrs. Mitchell's on Main, Cape Cod Sweat & Tee Outlet, Soft as a Grape, Islands, Mass Bay Co., Cape Cod Harley Davidson, Persy's Place, British Beer Company, Katie's Homemade Ice Cream and Smith Family Popcorn.

Yet while this submarket is the one most heavily represented in Main Street's retail mix today, there are opportunities to increase its level of expenditure there still further.

[2] In contrast to demographics, which describes submarkets in quantitative terms (e.g. population, household incomes, home values), psychographics characterizes them qualitatively (e.g. lifestyles, sensibilities, aspirations). An impressionistic tool, however, psychographics is best understood in the aggregate and not on a person-by-person basis. That is, no one individual perfectly fits the profile of a particular psychographic segment. Rather, each of us is a mix of multiple personalities in varying degrees: we might one part of ourselves most of the time but indulge a different side on a Friday night and yet another on a Saturday afternoon.

Take beer, for example. Bars in Hyannis appear to skew towards so-called "Big Beer", but the continued growth of craft brewing nationwide – from 5.0% market share in 2010 to 13.2% in 2018 (see chart below) – suggests that it enjoys more than just niche appeal. As evidenced by Tap City Grille's popularity, taprooms that combine selections from local micro-brands (e.g. Cape Cod Beer, Barnstable Brewing, Naukabout Beer, Hog Island Beer, etc.) with elevated tavern fare are likely to resonate.



Sources: Brewers Association, Statista

Another area of opportunity is diversified entertainment, referring to concepts that drive foot traffic with forms of recreation other than eating and drinking (even while in many cases still relying on food and beverage to generate the lion's share of the revenue). Indeed, Main Street recently welcomed Flashback, a bar and restaurant which differentiates itself with a selection of roughly two-dozen vintage arcade games that can be played for fifty cents.

In addition, there are the fast-growing "paint-and-sip" franchises, where patrons learn how to paint while enjoying a glass of wine or a cocktail. And while Cape Cod Art Bar (at Mashpee Commons) might already absorb much of the demand for this sort of experience, newer variants focus on other D.I.Y. crafts like, for instance, wood-working (see image below), which would seem especially promising for the Cape, where so many historic homes are adorned with custom wood signs.

Finally, factory outlets, selling well-known brands at (what is perceived as) less than full-price, would also prove popular. The kind of large open-air strip center where such stores typically congregate does not exist on the Cape, with the closest one, Wrentham Village Premium Outlets, more than 70 miles away. A growing number, however, have started to open freestanding locations in Main Street settings, especially in markets without a more conventional alternative.[3]

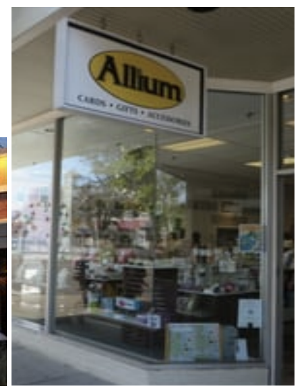
[3] The roughly 26,000 sq ft earmarked for such tenants in the Market Basket-anchored strip center located at the foot of the Sagamore Bridge – and the 157,000 sq ft in the now-defunct Cape Cod Factory Outlet Mall which it replaced -- fall well below the super-sized 500,000+ sq ft outlet malls developed today. Wrentham Village, for example, contains 610,000 sq ft of retail space. Given the distance from Wrentham, however, the market might yet be able to support a project of that scale: the "Canalside Commons" site is challenged by uncertainties surrounding possible replacement of the Bourne Bridge and related road realignments, but if another were to be put in play, the potential on Main Street to attract one or more such stores would presumably drop.

* Another relevant submarket on Main Street is the **Hyannis Port / Osterville / Nantucket set** (hereafter referred to for ease of reference as the "HONs"). Affluent empty-nesters and retirees with expensive tastes, they will spend freely on sit-down dining, entertainment as well as apparel and art.

The impact of the HONs, however, is thought to be attenuated by two factors. One, as owners of multiple homes, their presence is heavily concentrated in the high and shoulder seasons. And two, some of them undoubtedly find the mid-market orientation of Main Street's retail mix to be off-putting.

Also, there is a wealth of alternatives for their patronage, like Osterville's Main Street-Wianno Avenue area, Mashpee Commons, Falmouth Center and Downtown Nantucket, not to mention the communities where they spend the rest of the year (e.g. New York City, Connecticut's Fairfield County, Boston, etc.).

That said, a modest though not-insignificant number of businesses on Main Street clearly draw this customer, including, for instance, the Puritan flagship store, Seabreezes, Allium, Solstice Day Spa as well as Naked Oyster and Colombo's Café.



With this in mind, it is possible to imagine that Main Street, with certain additions to the retail mix, could capture a greater share of HON expenditures. This might include, for instance, <u>high-end consignment shops</u> featuring designer brands – as more than one-quarter of luxury shoppers today also buy second-hand apparel[4] -- and <u>upscale full-service restaurants</u> with healthy fare that would appeal to an aging demographic.

The enduring popularity of Pain D'Avignon's café and restaurant, hidden in a light-industrial zone on Hinckley Road across from Barnstable Municipal Airport, offers a testament to the power of high-quality product (and atmospherics) in overcoming any negativity associated with immediate surroundings.

[4] According to ThredUp's 2019 Retail Report.

Main Street would also benefit in this regard from further investment in the pedestrian connection to and from Hyannis Harbor, which boasts several draws -- the Hy-Line Cruises Terminal, the Hyannis Harbor Hotel, a handful of upmarket restaurants – that are popular with HONs. One possibility worth exploring would be the pedestrianization of Ocean Street between Main Street and the Harbor during high season.

Finally, the opportunity to boost demand and improve perceptions among the HONs is central to the argument for siting a new Oceanside Performing Arts Center in the vicinity of Main Street, as the presence of such a venue would not only bring them there more often for sit-down dining but also provide for a sort of "halo-effect" owing to the association with high culture.

* Main Street can also draw on the potential of the **neo-hipsters**. These are young people (and the young-at-heart) who celebrate creativity and craft. Their tastes are typically described as eclectic and artisanal, and their sensibilities, as urbane and cosmopolitan. They spend on food and beverage, diversified entertainment as well as boutique shopping.

The Cape struggles both to attract and retain neo-hipsters owing to the lack of relevant job opportunities as well as the tradition-bound culture. That said, their share of the year-round residential base, while modest, is not insignificant, and their number increases considerably during the high season with the influxes from the Boston and New York City metropolitan areas.

Indeed, there is considerable evidence of their presence across the Cape, at businesses like Snowy Owl Coffee Roasters (Brewster and Chatham), Sunbird Kitchen (Orleans), Organic Market (Mashpee Commons and Dennis Port) and Left Bank Gallery (Orleans and Wellfleet), among others.

In fact, Hyannis' Main Street can point to its own crop of neo-hipster draws, including Red Fish Blue Fish, Crazy Mermaids, Seaporium, the LoveLocal Collective, the HyArts Cultural District as well as Pizza Barbone and Anejo Mexican Bistro.

Not only, however, are neo-hipsters on the Cape today, but also, they represent the *next* generation of empty-nesters who will be moving and/or retiring there. For Hyannis, then, to retain its appeal in the longer term, it will need to cater even more to such tastes and sensibilities.

This demands, first and foremost, the continued refresh of Main Street's food and beverage offerings. One, neo-hipsters have been on the leading edge of the craft-beer movement and would undoubtedly flock to the kinds of taprooms proposed earlier in connection with the mid-market customer.

They are also among the driving forces behind so-called "Third Wave" coffee, referring to roasters and cafes like Three Fins in West Dennis and Snowy Owl in Brewster that reframe its preparation and consumption as an artisanal process and experience with parallels to the wine industry.

Neo-hipsters have also helped to foment the ongoing revolution in dining, not just as "foodies" who pay close attention to ingredients and chefs, but also, as ready consumers for new food-delivery formats that break with longtime industry custom, like food trucks and "fast-casual" eateries.

Unlike older patrons who believe that fine dining necessarily means sit-down restaurants with advance reservations, waiters and waitresses, individual tables, etc., neo-hipsters realize that some of the best and most inventive food might require waiting on a line, ordering at the counter, eating at a communal table, even busing one's own plates and cutlery afterwards.

At Sunbird Kitchen in Orleans, which started as a food truck in Wellfleet, customers order lunch at a counter, as they would at a fast-food restaurant, and might have to eat it at a communal table. And in typical "Third Wave" fashion, they also have the option of "pour over" coffee rather than drip.

Finally, this submarket is drawn to artsy, independently-owned shops with unique brands and merchandise, though in light of its relatively modest size as well as the rise of e-commerce (which younger neo-hipsters in particular have embraced), these are more likely in the form of heavily curated "micro-boutiques" that co-locate with other such businesses in shared spaces, like LoveLocal Collective.

* Neither of the latter two submarkets -- the HONs nor the neo-hipsters -- are large enough, however, to stand on their own. Furthermore, pushing Main Street too far in either or both directions runs the risk of alienating its core mid-market customer and killing its "golden goose". And yet we have found elsewhere that those who work in the field of commercial corridor revitalization will often do so anyways.

Why? Because many of them suffer from a blind spot: a common aesthetic sensibility rooted in their educational backgrounds and professional biases. They will often assume, for example, that there is a general consensus about what does and does not *look* good, in terms of facades, signage, fixtures, displays, etc., and will therefore view as "tired" or "dated" what others might be fine with if not drawn to.

The mid-market customer, meanwhile, is often attuned to perceived signals that indicate who is and is *not* welcome. Ingredients that he does not recognize or pronounce, shop interiors that he finds overly precious or pretentious, price points that he cannot tie to a sense of inherent value or worth – all of these experiences can leave him feeling alienated if not outright resentful, that this is a town where he no longer feels that he and his family belong.

In order, then, to expand or even maintain its appeal to this customer, Main Street needs to ensure that it stays "accessible", that it continues to welcome rather than intimidate. This means that new businesses must adopt a look and feel that, even if unmistakably modern, does not go *too* far, or alternately, that the retail mix as a whole reflects a wide range of tastes and preferences, such that there remains, roughly speaking, something for everyone.

Rendez Vous Café & Creperie (left), with its approachable feel, works as a gathering space for Main Street in a way that Provincetown's Kohi Coffee (right), with its artisanal pretention, probably never would.

* The recommended market positioning for Main Street, then, might be expressed as "**A Main Street *For The People*[5], plus crossover**", in reference to its primary base of mid-market consumers as well as its opportunities to further penetrate the more modestly-sized HON and neo-hipster submarkets. Another way of describing such a retail vision is that Main Street should embrace its diversity while also striving to broaden its reach.

Tap City Grille is again worth mentioning here, as an example of this market positioning at the level of the individual business. The concept offers the familiarity of the bar and grill format but with a moderately contemporary (yet not intimidating) look and feel, a focus on craft and local beers as well as a menu full of elevated takes on pub grub. Its owners, according to the website, "sought to open a gastropub centered on handcrafted brews and the growing foodie culture on Cape Cod."[6]

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5 We wish to credit Sarah Colvin of Cape Cod Community Media for the "For The People" tagline: she used the phrase in reference to Main Street's retail mix during an interview undertaken for this assignment.

6 https://www.tapcitygrille.com/pages/about-us

Orleans Center, meanwhile, appears to strike such a balance at the level of the larger district. It features a host of mid-market draws like Christmas Tree Shops, The Goose Hummock Shop, Cuffy's, Cooke's Seafood and the ever-popular Hot Chocolate Sparrow while also catering to neo-hipsters with concepts such as Sunbird Kitchen, The Corner Store, Guapo's Tortilla Shack, Frances Francis, blake & co., Left Bank Gallery and NewFarm.

- Another approach to segmenting Main Street's consumer profile – indeed, the way in which it is more commonly understood – is the seasonal versus year-round dichotomy. While we feel that our earlier framework, grounded in demographics and psychographics, is ultimately more useful, some aspects of this binary are nonetheless worth addressing:

* Generally speaking, **short-term visitors** – daytrippers and weekenders, for example – are the most reliable customers for Main Street. This might seem counterintuitive, but leisure travelers tend to be in a different frame of mind than residents. They are not pressed for time, oriented towards convenience or fixated on price; rather, they are on vacation, guiltlessly willing to treat themselves (and/or their kids), primed to spend and ready to buy on impulse.

As shoppers, then, they are typically less vulnerable to the lures of competitors, either ones elsewhere in town or even on their smartphones. A visitor enticed by a gift item in a Main Street store is not about to walk to her car, drive to Route 132 and compare it to the alternatives there. And even if she can also find it at home or buy it for cheaper online, she is unlikely to forgo the instant gratification of buying it on the spot. She is, in a sense, "captive" to what is in front of her (see caption below).

The ubiquity of commodities on Main Street that can be easily found elsewhere or at home – a Cape Cod sweatshirt at Soft As A Grape or an ice cream cone from Ben & Jerry's – is a function of the "captive" market that predominates there

Indeed, while village centers are often not the primary draw of tourist destinations – and even the many charming ones on the Cape do not exert quite the same pull as, say, the beaches -- "shopping, dining and entertainment in a pedestrian-friendly, intimate setting" is, according to the Destination Development Association (DDA), the top *complementary* activity, accounting for roughly 80% of non-lodging visitor spending[7] (see caption below).

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[7] As stated in the presentation entitled "Tourism & Downtown: The Hot, New Power Couple", by Roger Brooks of the DDA, a Peoria, AZ-based membership association that serves as a resource for the destination-marketing industry.

"Shopping is still an inherent part of many people's vacation experience, making tourists a more reliable brick-and-mortar customer," according to Neely Woodson Powell, Founder and CEO of Charleston Shoe Co.[8], a national chain-let that opens stores in areas with affluent vacationers, such as Nantucket (image) and Edgartown.

Hyannis is also a known brand among visitors far and wide. According to 2018 surveys of (off-Cape) New England residents, it enjoys the second-highest name recognition among all of the towns on the Cape, well ahead of Falmouth, Chatham and Nantucket (and behind only Provincetown).[9] And due largely to the Kennedy association, its profile extends well beyond the U.S., with foreigners reportedly comprising 25% of the visitation to the John F. Kennedy Hyannis Museum.[10]

Furthermore, while local residents will complain incessantly about stigmas and social services, those aforementioned New Englanders tend to speak far more positively about Hyannis, associating it with "beaches", "boats", "water", the "ocean" and the "Kennedys", even with words like "expensive", "shopping" and "restaurants" (see word cloud below), while barely mentioning negatives such as "crime" and "drugs".[11]

Finally, Hyannis offers the nearest walkable village center for the large number of guests staying at the accommodations along Route 132 in Hyannis or Route 28 in neighboring South Yarmouth. Indeed, for many of the parents there, Main Street undoubtedly beckons as a place to escape to, either as a couple or as a family, after hours spent in cramped motel rooms, at loud water parks or packed mini-golf courses, etc.

8 According to a March 18, 2019 *Footwear News* article by Madeleine Streets titled "Why Charleston Shoe Co. Plans to Blitz the New York Market".

9 Undertaken by NAIL as part of the Cape Cod Chamber of Commerce's branding exercise.

10 Reported to us by John L. Allen, the Museum's President, according to internal surveys that it has conducted.

11 Created by NAIL as part of the Cape Cod Chamber of Commerce's branding exercise.

One of a great many among “Motel Row” in South Yarmouth

Short-term visitors, then, can be relied upon to both spend time on Main Street and money in its businesses. And to a certain degree, they will take whatever is presented to them, whether it is completely generic or uniquely local. For the purposes of differentiating the retail mix and driving repeat traffic, though, stakeholders should avoid a “me-too” vision that aspires to what already exists elsewhere and instead promote <u>concepts that speak to what is uniquely Hyannis</u>.

Consider, for example, Provincetown’s Shop Therapy (image below). While the variety store / head shop has invited its share of controversy since first opening on Commercial Street in 1996, it also captures much of what makes Provincetown so distinctive and compelling, including the town’s countercultural past, its “anything-goes” reputation, its artistic bent as well as its tourist-driven commercialization. Indeed, one could not really imagine seeing such a retailer in any of the Cape’s other village centers.

Shop Therapy *says* Provincetown; what *says* Hyannis?

* As a market for retail, the year-round **residential base** represents something entirely different. With 578 persons per square mile (i.e. 53,444 people living in a trade area of 92.44 square miles), its population density would fit the U.S. Census Bureau’s definition of “rural”. And while its median household income of $60,000 is solidly middle-class, a disproportionate share of that income is absorbed by the high housing costs typical of vacation / second-home destinations.

Also, while Hyannis is no doubt the retail hub of Barnstable County, that status is almost entirely due to the regional draws along Route 132 (see image below), which include the only Cape Cod locations for Macy’s, Kohl’s, Old Navy, Sephora, ULTA Beauty, Target (coming), BJ’s Wholesale Club, Whole Foods Market, Trader Joe’s and a host of others. Main Street, on the other hand, contains little that would compel residents to visit on a regular basis.

Regional retail along Route 132 in Hyannis

Furthermore, Main Street does not play a prominent role in the regional roadway network that would force motorists to pass through *en route* to other destinations. Unlike Route 132, it is not directly accessible to and from Route 6. Meanwhile, Route 28 effectively serves as a east-west bypass *around* Main Street. Even the affluent denizens of nearby Hyannis Port are forced to take South Street while driving eastbound through town.

In other words, Main Street does not really figure in the routines of locals, either their commuting patterns or their shopping habits. As a result, it does not enjoy the sort of repeat visibility that serves to establish and reinforce what is known as "consumer mindshare". Locals might go there every so often -- for a specific purpose or destination like, say, a coveted designer label at Puritan, churrascaria at Brazilian Grill or a "Sunday Streets" event – but otherwise, *it is not really on the map*.

- This gets to the heart of what drives residents as consumers. Unlike visitors who are in town for leisure, these are people going about their day-to-day lives. In deciding which businesses to patronize, they are motivated to a far greater extent by convenience than impulse. And in this respect, Main Street – with its absence of conventional retail anchors, its out-of-the-way location, its one-way directionality and its lack of in-and-out parking -- cannot compete with the alternatives.

Due to these last two variables, Main Street cannot even count on the patronage of those living in the immediate vicinity. Indeed, with the likes of CVS, Speedway, McDonald's, 7-Eleven, Burger King and Santander, North Street is clearly the favored corridor for businesses that cater to basic day-to-day needs and that desire village-center locations, as it provides for two-way traffic while offering lots that are large and deep enough to accommodate on-site parking spaces and drive-through windows (see caption below).

Concerns about competition often focus on commercial arterials like Route 132 or online giants such as Amazon, but in smaller cities with relatively low development intensities and land values, the more immediate threat is often a secondary street within the village center itself that can offer greater convenience to motorists, like North Street.

- Locals are not just more likely to be deterred by inconvenience, however. Like all of us, they are subject to the lure of nostalgia, and prone to viewing (and judging) their main street within the context of how they remember it from the past. For them, it is not just there for a drop-in visit; rather, it is a part of their respective communities. As such, it must capture their aspirations, reflecting how they want to see themselves and be seen by others (see caption below).

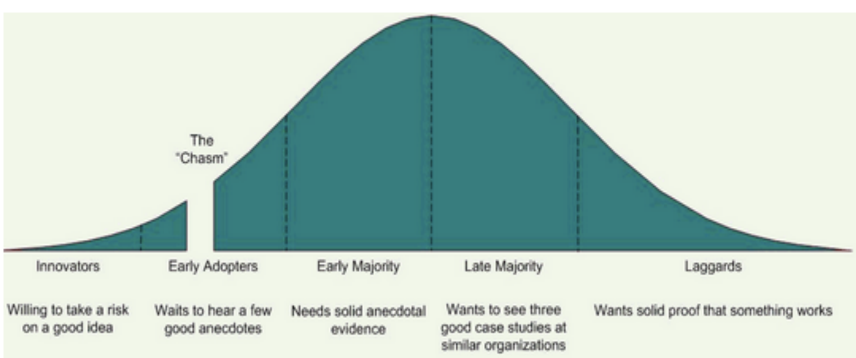
The role of aspiration in retail revitalization can be easily grasped by again recalling last year's backlash to the possibility that Dollar Tree might be the one back-filling the former Wings Beachwear space at 529 Main Street (image), now occupied by Sturgis Charter School.

For these reasons, their judgments on the subject can seem disproportionately harsh. Long familiar with their main street's foibles and flaws, many of them have developed perceptions and biases that have only hardened over time, reinforced by conversations with others as well as op-eds in the local media, resulting in what sometimes feels like one big "echo-chamber" of negativity and despair as well as a heightened sensitivity to perceived slights from without.

Since such an entrenched dynamic is not easy to reverse, local residents typically imply much higher costs (than visitors) for what is know in the industry as "customer acquisition". That is, main streets and their individual businesses usually need to expend considerably greater energy and resources – more intensive marketing and deeper promotions, for example -- in order to attract them initially and then to retain them as repeat customers over time, translating to slimmer margins and smaller returns.

Of course, not all residents are the same: some will be easier (and thus, cheaper) to entice and keep than others. While no one, for example, especially *likes* to be confronted with a social-services population or forced to park some distance from her destination, there are many for whom such discomforts and inconveniences do *not* amount to deal-breakers. With these sorts of locals, the customer-acquisition costs will be correspondingly lower.

This phenomenon can be more clearly understood by borrowing from the tech world. The "technology adoption lifecycle" (see image below) characterizes the process by which new products and innovations are embraced by consumers. This starts with the initial pioneers and the early adopters, then reaches a crossroads – known as "The Chasm"[12]– at which point it either loses steam or starts to infiltrate the larger mass market, eventually reaching even those who are the most resistant to change.



The technology adoption lifestyle

[12] The concept of "The Chasm" was originally developed by management consultant Geoffrey A. Moore in his 1991 book, "Crossing the Chasm: Marketing and Selling High-Tech Products to Mainstream Customers".

Commercial-corridor revitalization efforts often make the strategic mistake of focusing on this last cohort, the laggards. These are the naysayers who can only conceive of success as a return to a mythical past, and who tend to fixate on the aforementioned discomforts and inconveniences. They will be the *most* difficult (and costly) to convince at this stage, and yet, since their voices are typically the loudest and most respected, their negativity and pessimism can slow if not halt forward progress.

Right now, energies and resources should be concentrated instead on the innovators and early adopters, that is, those for whom the challenges do *not* amount to deal-breakers and are not even worthy of mention. In terms of customer acquisition, they offer the greatest bang for the proverbial buck.

These consumers are more likely to be younger, without the baggage of nostalgia to constrain their sense of what Main Street could and should be, although they are not exclusively so. Rather, they are most accurately understood as the neo-hipster psychographic, which, as noted earlier, also encompasses empty nesters and retirees who remain "young-at-heart", open to new models and upbeat about the possibilities.

They are enticed by concepts like Tumi Ceviche Bar & Ristorante (see image below). Few would have predicted upon its 2014 opening, in a hidden alley location and featuring an unfamiliar cuisine, that the sit-down restaurant would still be kicking five years later, and yet it has managed to develop a following with what *LiveLoveLocal* described in a 2015 review as an "eclectic and sophisticated menu" in a "refreshingly hip and welcoming setting".[13]

Tumi Ceviche Bar & Ristorante, with a Main Street address but an alley location

Tumi, however, offers a case study in how a concept can also appeal to more risk-averse consumers, thus achieving that all-important crossover draw: while it references Peruvian culture in its signage and décor, its menu also offers more familiar Italian dishes like fettuccine carbonara and shrimp scampi as well as "fusion" creations such as fettuccine a la huancayna and andean risotto -- along with a glossary of Peruvian ingredients.

With this approach, Tumi appears to have found a way to span the chasm in the adoption lifecycle. Other tenants capable of the same are "bellwether" brands: already widely known and highly regarded, their arrival can help to elevate a particular shopping center or village center in the minds of those who have historically dismissed it, sending a strong message both to consumers as well as other expansion-minded businesses.

The actions of bellwethers have long been closely followed within the tenant community. For years, the commitment of the Gap served to legitimize unproven locations in the minds of other retailers: not only was its site selection considered top-notch but also, the brand itself would instantly become a draw that generated foot traffic. As a result, it was highly coveted by developers and landlords. Today, that level of influence now belongs to others, like Apple, Whole Foods Market or Lululemon.

13 http://lovelivelocal.com/tumi-ceviche-bar-and-ristorante/.

Village centers unable to entice large chains (or uninterested in trying) can instead leverage the bellwether status of locally-established restaurateurs. Consider, for example, the impact of the decision by Jamie Surprenant (see image below), co-owner of Five Bays Bistro (since 2002) and Crisp Flatbread (since 2013) in Osterville as well as Anejo Mexican Restaurant and Tequila Bar (since 2010) in Falmouth, to open the large, 309-seat Anejo Mexican Bistro and Beechtree Taqueria on Hyannis' Main Street last year.

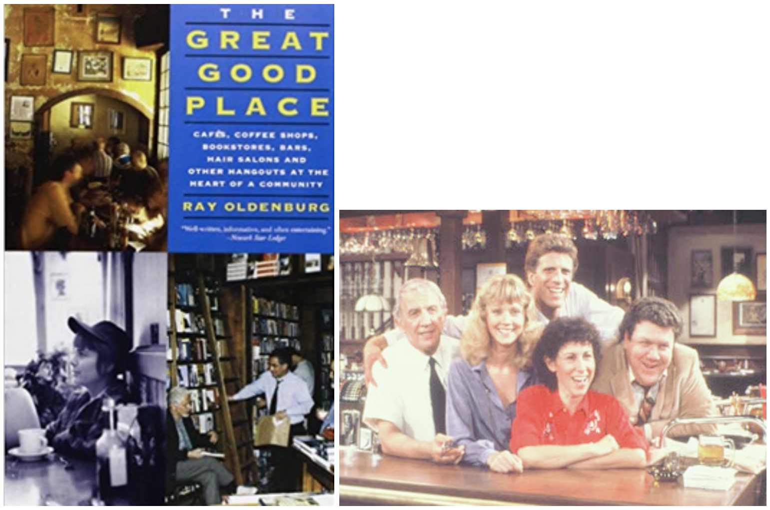
Established Cape Cod restaurateur, Anejo co-owner and local "bellwether" Jamie Surprenant

- Some residents might not be overly enthusiastic about the recommended market positioning ("Main Street For The People, plus crossover"), as it does not reflect what they aspire to for Hyannis. Indeed, not everyone will be happy with a vision that does not put them first, especially if they have become accustomed to such primacy or deference over time. Tolerating such pushback will require no small amount of political will, inasmuch as they tend to occupy positions of influence, elected or otherwise.

It is worth reiterating, however, that retail revitalization is an evolutionary process – a marathon, not a sprint -- and that striving to reach this next stage represents the most promising path to the desired end-state. Leapfrogging can be attempted, but it will almost certainly backfire: the opening of the "perfect" business might offer a short-term boost, but, having arrived before its time, will most likely fail to stay afloat, only deepening the pessimism of residents and the reluctance of would-be tenants.

The retail revitalization of Manhattan's SoHo did not start with luxury designers: the world-renowned shopping destination has traveled a long road since the dark days of the '70's (image).

That said, it will also be essential that locals, while perhaps not getting exactly what they want (just yet), continue (or start) to feel – in the present -- as if Main Street is in some way *theirs.* This requires a series of monetizable and ultimately sustainable "Third Place(s)" – separate from home and work – where each resident can find his/her tribe and feel a sense of belonging (see caption below). Businesses that appear to be playing this role today include The Daily Paper, Rendezvous Café & Creperie and Colombo's Café.



The notion of the "Third Place(s)", first articulated by sociologist Ray Oldenburg in his 1989 classic *The Great Good Place*, gained wider cultural currency with the rise of Starbucks Coffee as well as the popularity of TV shows such as *Cheers* ("where everybody knows your name, and they're always glad you came").

Another retail use which often assumes great symbolic (if not practical) importance in fledgling village centers today is the grocery store, as a sign of its livability to a growing residential base. Indeed, community stakeholders have expressed hope for some sort of small-format specialty food market – along the lines of a Fancy's Market or a Barnstable Market – either on Main Street or in its immediate vicinity.

As in so many other reemergent urban areas across the country, the arrival of a grocery store has been viewed as the moment at which Boston's Seaport District would become a real *neighborhood*, and indeed, the recent announcement that Trader Joe's will be opening a Fort Point location was cited by the *Boston Globe* as evidence that "in evolutionary terms, the Seaport [has] entered a new epoch."[14]

Such a concept would be challenged, however, by an inadequate density of middle and upper-income households within close proximity. This is not to say that one would be impossible, just that it would need to be *heavily* cross-subsidized for the foreseeable future by a property owner as well as other revenue sources (e.g. sandwiches, coffee, etc.), and would require an automobile-friendly location with both two-way traffic and at least a handful of dedicated, on-site parking stalls.

Next Steps

- Again, we want to reiterate that this memorandum was always intended as just the first phase of a more extensive scope-of-work, with the lone objective of devising a retail market positioning strategy for Hyannis' Main Street.

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14 https://www.bostonglobe.com/metro/2019/04/14/the-seaport-district-starting-look-more-like-neighborhood/tfBcdjwVAe4KwNRt119VFI/story.html

Obviously such a strategy will amount to very little without a blueprint for practical implementation. The retail vision outlined in these pages will not happen on its own, or else the free market would have already brought about its realization.

The following, then, describes the next steps that need to follow, contingent on the availability of additional funding (which has yet to be secured). The stakeholders that need to take the lead on each have been indicated in parentheses.

* Implementation Plan (Hyannis Main Street BID, Town of Barnstable): The purpose of this phase would be to provide guidance on the specific roles that the various stakeholders can and must play, as based on an assessment of overall needs and political dynamics as well as the mandates, interests, capacities and resources of each.

For the Town of Barnstable, it would outline any recommended changes to the current zoning and regulatory framework as well as other relevant municipal policies and programs. It might also propose additional tools and incentives that could help with retail attraction and retention.

It would specify the ways in which the Hyannis Main Street BID, as an organization beholden to business interests (versus the voting public), can complement the Town's efforts by offering a more entrepreneurial sort of support to the private sector.

It would also indicate how other community stakeholders – the Cape Cod Chamber of Commerce, the Greater Hyannis Chamber of Commerce, Cape Cod Healthcare, Cape Cod Five, etc. – could add the most value.

It would detail what those with the greatest influence on retail mix – the developers, landlords, brokers and merchants – would need to be prepared to do with regards to investment, leasing, merchandising, marketing, etc.

Finally, it would describe a calculated approach for selling both the vision and the roles to each of these would-be implementers, including both the arguments to use as well as the specific individuals to start with.

* Stakeholder outreach (Hyannis Main Street BID, Town of Barnstable): This next phase would consist of a series of presentations and one-on-one meetings designed to secure buy-in to both the overall retail vision for Main Street as well as the specific roles for the would-be implementers.

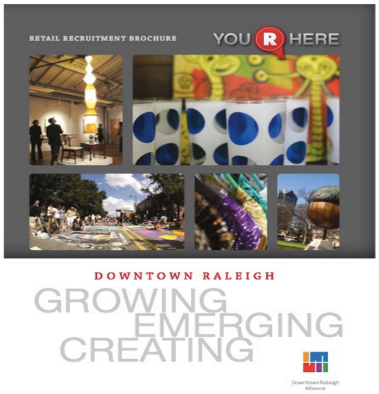
We are under no illusions that everyone – or even most – will be receptive. Such are the challenges of retail revitalization in Downtown settings with multiple stakeholders. However, we do not *need* everyone to respond positively at this stage, only the early adopters.

Our approach, then, will be guided by a strategic understanding of which specific individuals should be approached first and with what sorts of arguments, as well as which ones are best left for later stages of the adoption lifecycle.

To help with the outreach to the private sector, we will also develop a retail marketing brochure and webpage (housed on the Hyannis Main Street BID's site) that, using the language of the retail industry, strives to "tell the story" of and frame the opportunity presented by Main Street, with a specific focus on the kinds of tenants outlined in this positioning strategy and the data points that support the sales pitch.

We have found in our experience that such a tool can help both to educate landlords, developers and brokers on the nuances of market positioning (see image below) while also providing them with ammunition for their leasing efforts.

Finally, this marketing piece would be featured as part of a "road show" across the larger region, which might consist of presentations at industry events, opinion pieces for business publications, meetings with retail brokerages, etc.



In Raleigh, NC, our brochure (image) and outreach served the purpose of familiarizing property owners and leasing professionals of the conservative Southern city about the eclectic tastes and retail potential of the "hipsters" and "neo-hipsters" who had descended on their Downtown. The landlords and brokers took to these ideas readily, and today Downtown Raleigh's upward ascendance, as a hub for creative and alternative culture, is unmistakable, with the once-sleepy urban core having emerged as one of the Southeast's most dynamic.

* <u>Tenant prospecting and filtering</u> (Hyannis Main Street BID): While we believe that this memorandum provides some clear guidance on the kinds of retailers worth pursuing for Main Street, we have not been contracted to identify specific prospects, nor, we feel, would it have been appropriate to disseminate them as part of a public presentation or document.

We can, however, take this additional step of researching and pre-qualifying specific possibilities that would be new to the market, drawing on our proprietary database as well as canvassing in comparable village centers elsewhere in the larger region.

Prospects would be passed through various filters so as to arrive at the ones most likely to be interested and able to offer reassuring track records. The resulting list would then be relayed to landlords and their brokers in a carefully-structured process that matches the site criteria of individual tenants to the specifications of available spaces.

Note that this role for the BID would require additional buy-in as part of the stakeholder outreach, from the property owners and leasing professionals in particular, and that the Town of Barnstable would not be overtly involved so as to avoid perceived conflicts-of-interest.

Again, while this memorandum is not intended to serve as a comprehensive retail strategy, we nevertheless feel the need to recommend the following initiatives – even though they do not relate specifically to market positioning – as ones that would provide critical support for Main Street's retail revitalization. Lead stakeholders have been indicated in parenthesis.

* <u>Gather more detailed information on Main Street foot traffic</u> (Hyannis Main Street BID, Greater Hyannis Chamber of Commerce), so as to corroborate the qualitative approach utilized to arrive at the findings in this memorandum (or to modify them accordingly), by conducting intercept surveys of pedestrians in multiple locations along the corridor and at different times of the year, week and day. Respondents might be asked about where they live, how long they will be in Hyannis, why they come to Main Street, where else they shop / dine / recreate, what other kinds of businesses they would want to see, etc.

This would provide useful data and insights about who is actually *on* Main Street, both seasonally and year-round. Ideally it would be undertaken in tandem with another study, presumably led by the Cape Cod Chamber of Commerce, that aims to better understand Cape Cod's visitor population, specifically.

* Insist upon zero-setback retail fabric on Main Street for existing storefronts and new development between Old Colony Road to Sea Street[15] (Town of Barnstable), that is, ground-floor spaces flush with the sidewalk and filled only with uses welcoming walk-in customers, so as to bring pedestrians closer to the businesses themselves (see image below) and to keep them walking further, thereby maximizing the potential for retail sales as well as synergies between adjacent/nearby tenants.

Special permits should only be considered for harder-to-fill spaces. For example, very few tenants today – other than the drug and dollar-store chains -- are interested in and/or have the deep pockets for larger floorplates sized at 7,500 sq ft and up in a village center like this one. Requiring landlords in such cases to lease only to retail uses, then, seems like an undue hardship. That said, such exceptions should be periodically revisited so as to ensure alignment with shifting trends.

The recessed storefronts in the Hyannis Oaks Courtyard development (image) weaken the connection between pedestrians and businesses, thus reducing the likelihood of sales.

* Utilize creative approaches to fill major gaps in the retail frontage (Hyannis Main Street BID, Town of Barnstable), like, for example, the intersection of Main Street and High School Road, where the BID is thinking of acquiring 491-493 Main Street (see image below) and replacing the street-level police substation visitors with a visitor center, and where it could partner with the owners of the 500 Main Street property on the activation of that corner, say, with seasonal kiosks and trucks, public art, etc.

* Focus capital improvements on the twin goals of sustaining pedestrian interest and extending "dwell time" (Town of Barnstable). Studies in the retail industry have showed that the longer a person spends at the shopping center (and the fewer reasons she has to leave), the more she is going spend; the same holds for a commercial corridor, pointing to the importance of street-level activation (see above) as well as basic amenities like seating areas (designed to prevent loitering) and charging stations.

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[15] We understand that a current zoning restriction only permits retail and restaurants within thirty (30) feet of Main Street between Ocean Street and Sea Street. We would amend this restriction to allow for any tenant that welcomes walk-in customers – including, for example, theaters – and to extend it further east to New Colony Road, so that it also applies to the existing retail fabric on the northern side of that additional block as well as any future redevelopment plans on the southern.

* Relax permitted retail uses in the HVB Hyannis Village Business District zone (Town of Barnstable), so as to allow Main Street to evolve and adapt with a fast-moving industry in the midst of profound disruption. For example, the regulatory framework should be sufficiently flexible to accommodate whatever the *next* iteration of food and beverage might bring; right now, it does not even appear to allow for the increasingly common practice of on-site brewing or roasting.

* Identify alternative, less restrictive funding sources for signage and façade overhauls (Hyannis Main Street BID, Town of Barnstable), so that applicants are more willing to take advantage (than they have been with Federal CDBG monies) and dated/tired-looking storefronts are given a necessary refresh, thereby helping to improve Main Street's curb appeal and brand. Such financial assistance should be accompanied by free design services from an on-call architect.

* Convert the entirety of Main Street to two-way traffic (Town of Barnstable / Public Works), so as to generate more visibility for its businesses, provide easier access from the west, reduce the speed of its automobile traffic, enhance its intimacy and walkability as well as assert the role of Downtown more broadly as a true village center, rather than a pass-through for motorists.

* Explore the possibility of converting Ocean Street (from Main Street to Hyannis Harbor) to pedestrian-only during peak season (Town of Barnstable / Public Works), so as to improve connectivity and synergy with the village center's other center-of-gravity and its higher-income clientele, while also increasing the visibility of Main Street as the endpoint – and not just a pass-through -- for Harbor-bound motorists.

* Advocate for a new performing arts center within walking distance (Hyannis Main Street BID, Town of Barnstable, Oceanside Performing Arts Center), so as to help drive off-season foot traffic on Main Street, increase consumer demand for food and beverage concepts there as well as elevate the brand of the village center more generally.

* Diversify efforts to establish new drivers of foot traffic for the slower, off-season months (Hyannis Main Street BID, Town of Barnstable), including a new performing arts center (see above), a modernized conference center, additional "Third Place" venues as well as continuing education and "lifelong-learning" classes. New housing development in or near the village center would also help in this regard, assuming that it targets year-round residents.

* Develop standalone "start-up guide(s)" for different kinds of retail businesses (Hyannis Main Street BID), in concert with and using the same template as the author that created the one for restaurateurs, so as to guide would-be merchants through what can be an intimidating process, then both post them on the BID's web portal (see below) as well as distribute them to others within the support infrastructure, including leasing professionals.

* Apply further tweaks to Hyannis Main Street BID's existing (already-impressive) web portal (Hyannis Main Street BID), including, for example, a centralized database of available retail spaces (linked to the websites of their respective landlords and/or brokers), the aforementioned retail marketing pitch (as part of the "Why Main Street" page) as well as the aforementioned "start-up guide(s)" for restaurateurs and retail businesses.

* Leverage the entitlements process to ensure a symbiotic relationship with The Landing at Hyannis (Town of Barnstable), such that the place-making element at this new development does not give rise to a competing center-of-gravity for residents and that the leasing effort does not poach from among Main Street's most successful merchants (see caption below). Negotiations might also include demands for funding to continue with the implementation of this positioning strategy as well as the other retail-related initiatives outlined above.

While WS Development's plans for "The Landing at Hyannis" on Route 132 is a win-win for Hyannis and Barnstable, and while its halo effect will ultimately benefit Main Street, it also poses a near-term threat. One, there is at this point nothing to stop WS from approaching Main Street's most successful tenants and offering them opportunities to relocate. Indeed, this is precisely what the Cape Cod Mall (left) did, opening in 1970 with three anchors – Sears, Filene's and Woolworth – that it had lured from Main Street. Meanwhile, conceptual designs for the new project include "The Green" (right), to be used for picnics, children's playspace, even a skating rink in the winter. Inasmuch as this would serve as a community gathering space under *private* control, it would provide an alternative for residents looking to avoid the rougher edges of Main Street as a public realm.

* Revisit and update this positioning strategy on a periodic basis (Hyannis Main Street BID, Town of Barnstable), so as to ensure that it is always evolving in response to changing conditions, shifting tastes, disappearing anchors, new competitors, etc. The danger is that without such constant monitoring, Main Street's fade into irrelevance could happen so slowly -- if not imperceptibly -- that it only become recognizable *after* the point of no return has been reached.

Finally, all stakeholders should strive to project an upbeat and positive vibe when talking about Hyannis, both with those who know nothing about it as well as those who have historically thought little of it. As noted earlier, local residents seem to be the village's worst ambassadors, hyper-focusing on its struggles and challenges.[16] While this is not uncommon, such negativity can become contagious, introducing what is known as confirmation bias[17] and setting a motion a sort of self-fulfilling prophecy (see caption below).

If local residents speak ill of their village center, others will be less likely to see and appreciate its positives, and ultimately, to visit and spend, thus initiating a vicious cycle that can prove difficult to arrest.

After all, there is reason to be upbeat. Main Street remains a relatively healthy commercial corridor, one not only well-positioned – owing to its high level of visitor traffic – to survive the threat posed by e-commerce, but also, capable of expanding its appeal still further with its existing submarkets. Could it be more than it is? No doubt. But rather than viewing that as a criticism, one can see it as an opportunity, one that many other village centers do *not* have.

Fully realizing this potential, though, will require both deliberation and patience. Again, retail revitalization is a marathon, not a sprint. Buy-in will be needed from a multiplicity of property owners and other stakeholders. Leases on certain tenants will have to expire. Perceptions will not shift overnight. And

[16] Created by NAIL as part of the Cape Cod Chamber of Commerce's branding exercise.

[17] With confirmation bias, an individual places greater attention on data points that support his/her preexisting hypothesis, and less on ones that contradict it.

resistance to change will be strong, especially on the Cape. Only by staying the course, however, will we maximize the chances of getting to where we ultimately want to be.