

CAPE AND ISLANDS REGIONAL BLUEPRINT

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In the Fall of 2022, the MassHire Cape and Islands Workforce Board (CIWB) Team, along with its Board of Directors, held brainstorm sessions to update and revise the CIWB Mission and Vision Statements. This collective effort resulted in language and dialogue that provides a current reflection of the goals and purpose of the CIWB.

Mission Statement

“The MassHire Cape and Islands Workforce Board develops strategic partnerships and advocates for innovative solutions that provide equitable access to training and education. These efforts lead to sustainable career pathways, a skilled workforce, and economic resiliency in the region.”

Vision Statement

“A highly skilled, inclusive workforce that is prepared to meet the evolving employment needs on Cape Cod and the Islands, encouraging self-sufficiency and economic resiliency in the region.”

DEI Statement

"The MassHire Cape & Islands Workforce Board is committed to a policy of nondiscrimination. Educational experiences and employment opportunities are available to all regardless of race, religion, color, creed, sex, age, national origin, marital status, sexual orientation, disability, or veteran status. The Board recognizes, values and respects the diverse cultures and life experiences of all individuals and encourages and desires their presence on our staff and Board of Directors. A concerted effort shall be made to seek out individuals with diverse backgrounds."



Executive Summary

Workforce development, employee recruitment, and incumbent worker training strategies are vital to the sustained economic growth of Cape Cod and the Islands of Martha's Vineyard and Nantucket. As a region that has grown in population and infrastructure needs, a highly skilled, versatile, and self-sufficient workforce is key to meeting the demands of the year-round and seasonal economies.

In 2017, the Baker-Polito Administration issued a regional planning initiative that was led by the Governor's Workforce Skills Cabinet Secretariats. In response, the Cape and Islands' first Regional Market Blueprint was developed to identify skills and training gaps, along with strategies and priority actions, to support employer needs and highlight regional opportunities. The strength of the CIWB's strategic partnerships within the three Skills Cabinet sectors - Workforce Development, Education, and Economic Development – led to the creation of a well-rounded and relevant document that was accessible by a variety of stakeholders.

This revised Blueprint is intended to inform and assist stakeholders in advancing the economic and workforce development goals of the Cape and Islands Region. Population shifts, employment demands, and regional needs in housing, transportation and childcare have accelerated the conversation as to how the Cape and Islands' economy continues to transition post-Covid 19. As a result, the contents of this Blueprint have been updated to include changing demands in priority sectors, evolving occupational needs, and the necessity of training and educational resources.

Regional highlights expanded on herein include:

- Demographic and Labor Force statistics
- Population growth and forecasts
- In-Demand Industries and Occupations
- Regional economic and geographic overview
- Regional strengths and challenges

The information contained within this report provides an overview of regional workforce needs and serves as a useful resource for local employers, educators, and economic development partners in helping to reach our shared goals. We share this document with confidence, knowing that the commitment to growing our future workforce in this vibrant, historic, and treasured region continues to be important and impactful work.

Introduction: Regional Blueprint Planning Approach

One of seven workforce development areas in the Commonwealth of Massachusetts, the Cape and Islands Region is comprised of Cape Cod and the 15 towns in Barnstable County as well as the islands of Martha's Vineyard (Dukes County) and Nantucket (Nantucket County).

The planning process to develop the Cape and Islands initial Regional Market Blueprint began in 2017 and included input from a number of contributors. Convening participants from private businesses, area school districts, higher education, government and municipalities, the CIWB welcomed the voices of public and private entities around the region to develop a comprehensive working document to serve as a guide for an array of stakeholders.

Regional planning members joined the CIWB in collaborating to identify local and regional concerns while assessing competitive advantages and workforce demographics. Leaders in workforce development, education, and economic development shared valuable real-time insights.

In mid-2020, the planning process was revisited as the existing document became outdated in light of economic and labor developments. Challenges persisted in areas such as seasonally high unemployment, lack of training resources, and access to transportation. In addition, the region was impacted by a lack of job seekers and increasingly tight housing prospects. These combined factors prompted the need for updates to important content areas within the Blueprint to ensure the integrity of this resource.

While challenging, the CIWB faced these realities by leading with an intentional focus on building stronger Board, employer and academic connectivity. The CIWB is committed to educating and engaging regional partners on the numerous opportunities for collaboration. This focus has become the hallmark of the CIWB and has validated the important work being done in workforce development in our region.

The comprehensive document contained here outlines the Cape and Islands Region Market Blueprint and is the result of a collaborative effort centered on identifying the assets and challenges of the Cape and Islands workforce and how the region can most effectively move forward together. In addition to the Cape and Islands Region, the Berkshires, Central, Greater Boston, Northeast, Pioneer Valley, and Southeast regions have each produced regional labor market blueprints to inform policy-making and investments as we collaborate on the road to economic recovery.

The Cape & Islands Region consists of Barnstable, Dukes (Martha's Vineyard), & Nantucket Counties.

Barnstable County's 15 towns make up the area known as Cape Cod.

*Upper Cape:
Bourne, Sandwich,
Falmouth, Mashpee*

*Mid Cape:
Barnstable,
Dennis, Yarmouth*

*Lower Cape:
Brewster, Harwich,
Chatham, Orleans*

*Outer Cape:
Eastham, Truro,
Wellfleet,
Provincetown*

Regional Context

The Intersection of Geography and Economy

The area comprising Cape Cod and the Islands is a widely recognized swath of geography. Connected to the mainland of Massachusetts until the construction of the Cape Cod Canal in 1916, Cape Cod is home to 15 distinct towns and extends 65 miles into the Atlantic Ocean.

Martha's Vineyard and Nantucket, commonly referred to as the Islands, are the Cape's historic southern neighbors and operate under their own town and county governments. Together, the Cape and Islands are made up of 22 towns and more than 290,000 year-round residents, a number that swells to more than 750,000 residents in the summer months.



Waterways delineate the region with Cape Cod Bay to the North, Buzzards Bay to the Southwest, and Vineyard Sound and Nantucket Sound to the South. The Bourne Bridge and the Sagamore Bridge span the canal and provide automobile access to Cape Cod. Ferries and regional airports connect travelers to Martha's Vineyard and Nantucket, while buses and local rail service run seasonally to accommodate residents and visitors across the region.

Cape Cod and the Islands' unique geography has played a major role in its economic development for centuries. With more than 500 miles of sandy shoreline, Cape Cod and the Islands are a hive of hospitality all year but attract millions of global visitors during the summer months alone.

While visitors come to play and explore, many of the Cape and Islands' full-time residents work in local industries that support the infrastructure of the tourist trade. Restaurants, landscaping, and building services are among the largest industries, with some of the most in demand occupations generated by the industries that support the region's robust tourism businesses. Year-round demand for healthcare and educational services continues to increase as well, as population growth rates drive the need for an expanded workforce in those critical sectors.

The Cape and Islands' economy has historically been connected to the coast and waterways, thanks to marine trades and the region's maritime vitality. As a result, the region's "Blue Economy" dovetails with the Cape and Islands' workforce development efforts. Sectors including marine science, marine technology, clean energy - including Offshore Wind - and wastewater remedies will operate increasingly in concert with traditional maritime occupations in contributing to the region's economic identity.



CRITICAL TRENDS



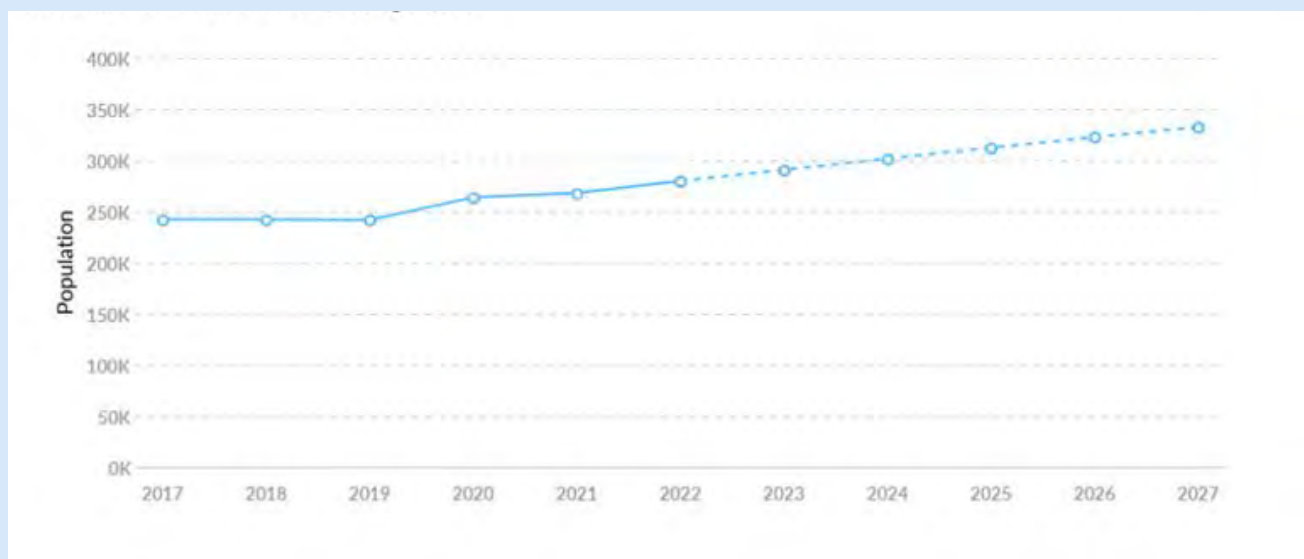
Population

Cape Cod and the Islands saw measurable population growth in the decade from 2010 to 2020, most notably in response to the Covid-19 pandemic. The overall increase in year-round residents was a shift from the prior decade when the region witnessed a population decline. The recent influx occurred rapidly and unexpectedly, straining human resources and infrastructure. As a result, slow and steady growth projections were replaced by real time assessments for this 'new normal.'

- Since 2017, the population of the Cape and Islands Region grew by more than 40k, reaching 290,000 residents in 2023.
- From 2010 to 2020, Nantucket was the fastest growing county in Massachusetts, increasing by 40.1% followed by Dukes County at 24.6% during the last decade.
- From 2010-2020, Barnstable County was part of the fastest growing region and 4th in the country for highest in-migration by county, compared to the 10 years from 2000-2010 when the county accounted for the greatest percentage of population loss in Massachusetts.

Historic and Projected Population Trends

As of 2022, the region's population increased 15.5% since 2017, growing by 37,488. Population is expected to increase 18.8% between 2022 and 2027, adding 52,676.

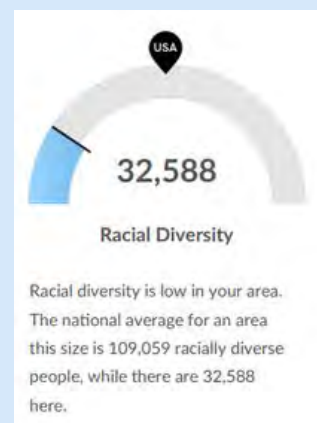


Source: Lightcast Q2 2023 Data Set | lightcast.io

Demographics

At A Glance

- The Cape and Islands region has a high percentage of mature residents, classified as those 55 years or older. As a result, the number of retirees and soon-to-be retiring residents in the region is high, with more than 128,000 residents aged 55+ versus the national average of just under 80,000 per region.
- Millennials, those residents aged 25-39, account for less than 40,000 residents, below the national average of 54,000 for an area of equal size.
- While the racial diversity of the region increased by 7% between 2010 -2020 according to Census data, the region remains predominantly white and English-speaking.
- More than half of the region's population has veteran status, greater than the national average.
- Regional average earnings per job in 2022 was \$72.9k vs \$80.9k for the national average.
- More than 50% of residents in the region have earned a college degree.

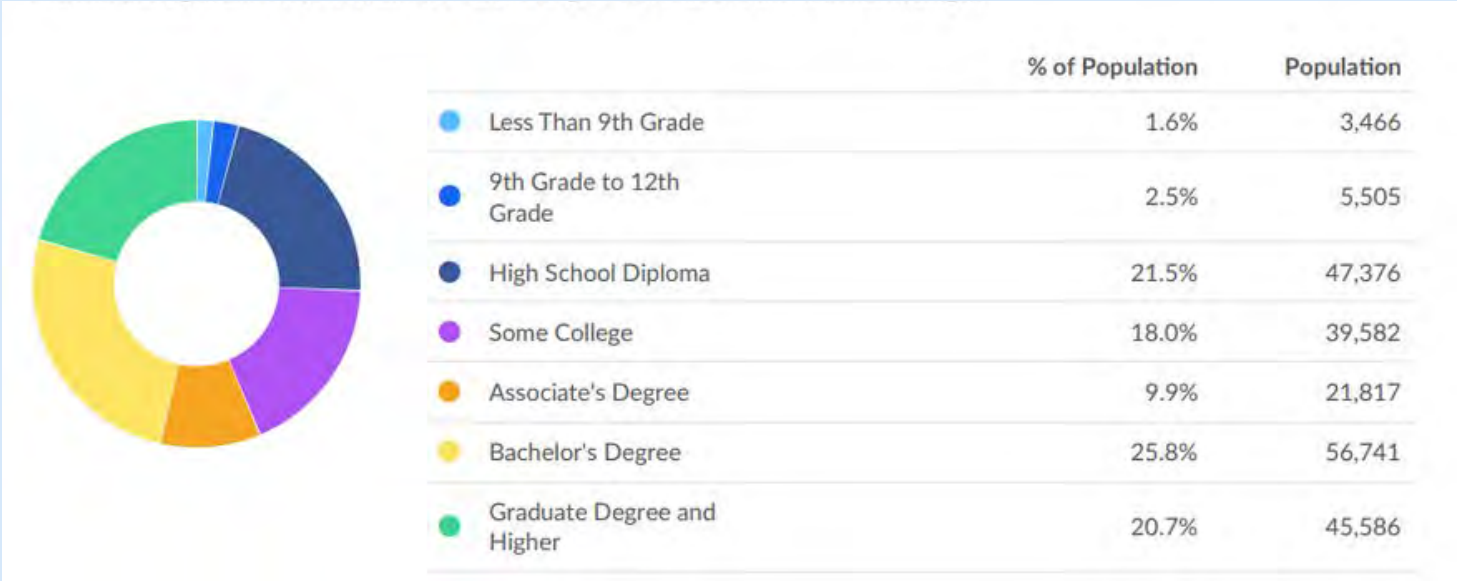


Source: Lightcast Q2 2023 Data Set | lightcast.io

Educational Attainment

The Cape and Islands Region exceeds the national average for educational attainment, which measures the percentage of residents with a high school diploma.

- More than 95% of residents in the Cape and Islands region possess a high school diploma.
- Greater than 50% of residents hold a college degree.
 - 25.8% of Cape and Islands residents possess a Bachelor's Degree, which is 5.0% above the national average.
 - 9.9% of residents have an Associate's Degree, which is 1.1% above the national average.
- In addition to strong public school districts, the region offers private and parochial school options and is home to Cape Cod Community College and Massachusetts Maritime Academy.
- Woods Hole Oceanographic Institution (WHO) is a private, non-profit research and higher education center, focused on marine science and engineering. WHOI is the largest independent oceanographic research institution in the U.S., with nearly 1,000 staff and students.



Source: Lightcast Q2 2023 Data Set | lightcast.io

Labor Force

Who comprises the Labor Force?

According to the US Bureau of Labor Statistics, the Labor Force is defined as all persons who are 16 years of age and older who are not inmates of institutions (eg, penal and mental facilities, homes for the aged), and who are not on active duty in the Armed Forces, who are employed or actively looking for work.

Employed Persons

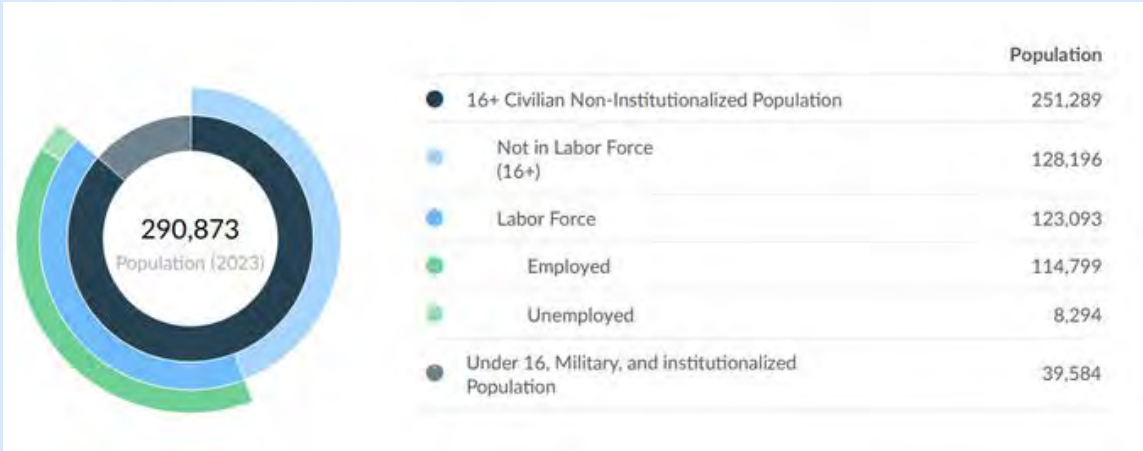
All persons who, during the reference week, (a) did any work as paid employees, worked in their own business or farm, or worked 15 hours or more as unpaid workers in an enterprise operated by a member of their family or (b) were not working but who had jobs from which they were temporarily absent.

Unemployed Persons

All persons who had no employment during the reference week, were available for work, except for temporary illness, and had made specific efforts to find employment some time during the 4-week period ending with the reference week. Persons who were waiting to be recalled to a job from which they had been laid off need not have been looking for work to be classified as unemployed.

Cape and Islands Region Labor Force Breakdown

March 2023

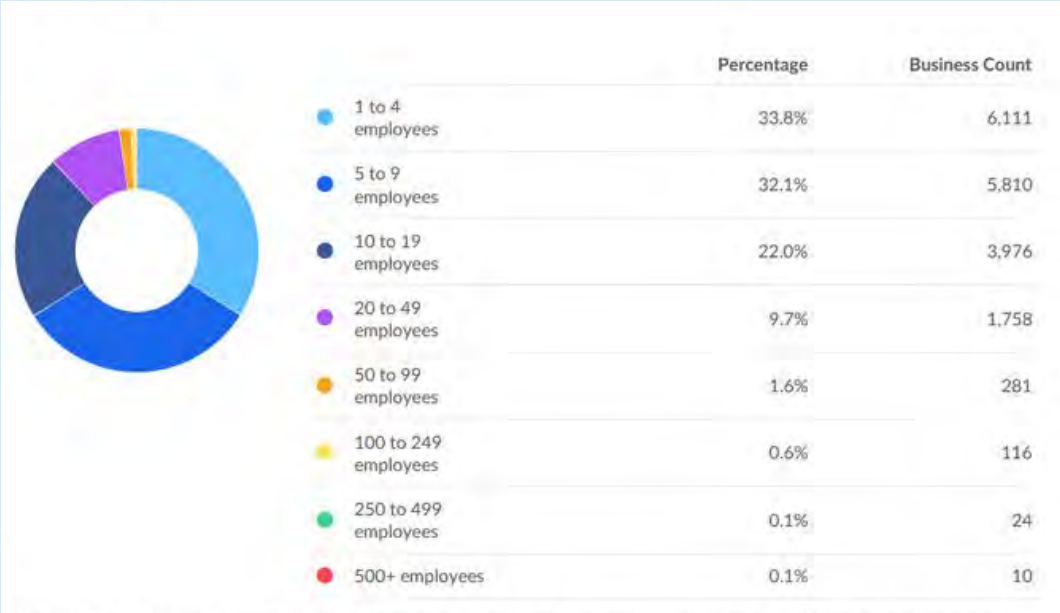


Source: Lightcast Q2 2023 Data Set | lightcast.io

Labor Force

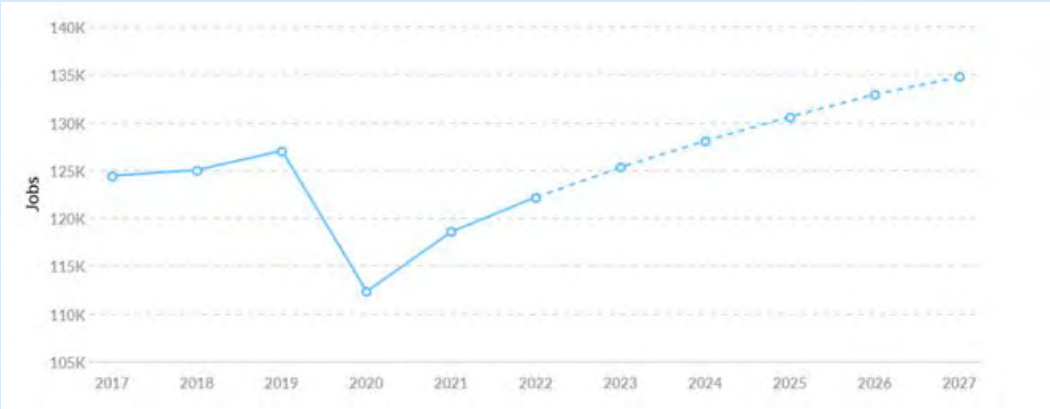
Business Characteristics

- Cape Cod and the Islands have a distinctive employer profile, with more than 89% of businesses having fewer than 20 employees.
- Business defined as 'micro businesses' - or those small businesses with fewer than 10 employees - account for more than 65% of all businesses in the region.



Job Trends

From 2017 TO 2022, jobs declined 1.8% in the region from 124,412 to 122,171. This change fell short of the national growth rate of 3.4 by 5.2%.

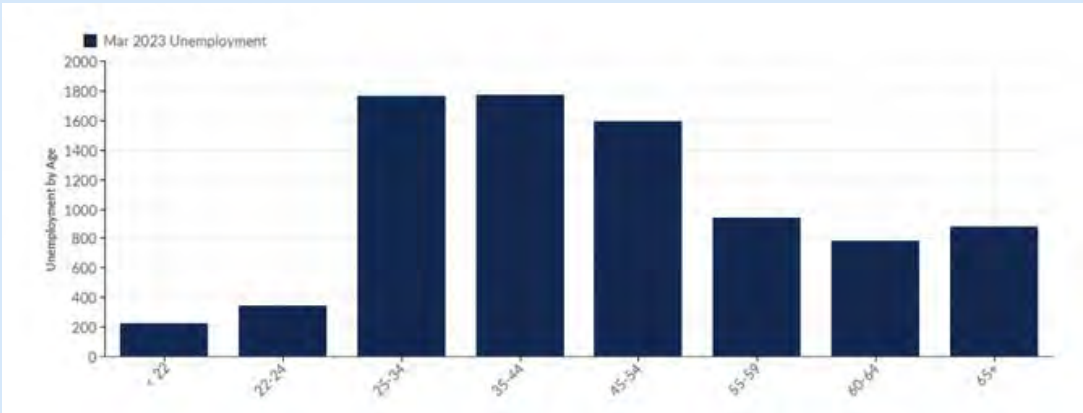


Sources: Lightcast Q2 2023 Data Set | lightcast.io

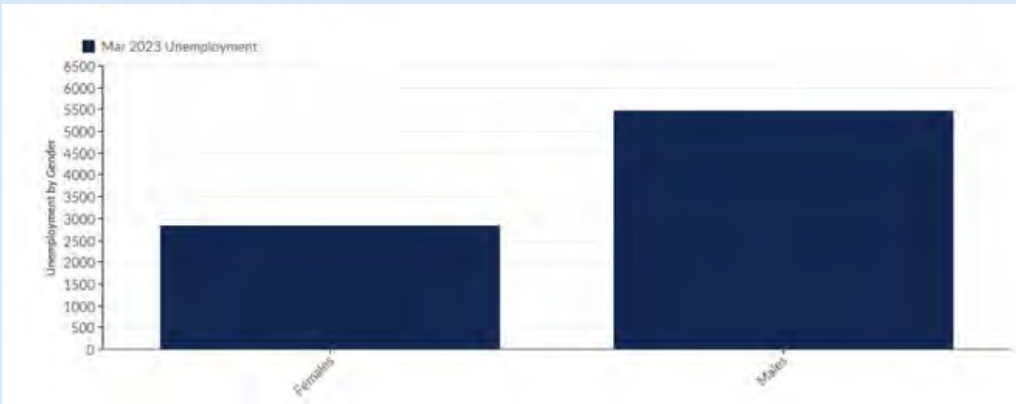
Labor Force

Unemployment by Demographics

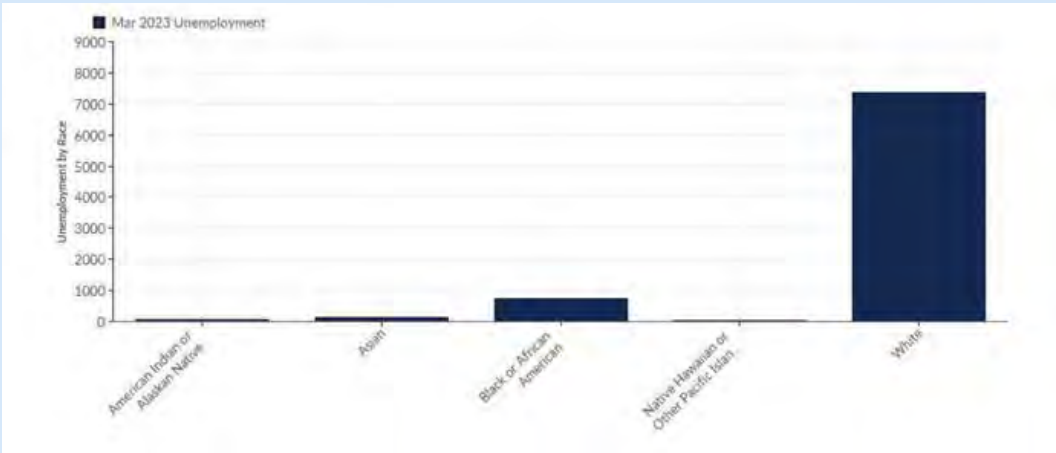
Unemployment by Age



Unemployment by Gender



Unemployment by Race



Sources: Lightcast Q2 2023 Data Set | lightcast.io



INDUSTRIES & OCCUPATIONS



Vital and In-Demand Industries

Economic success in the Cape and Islands Region will continue to rely on advancements in infrastructure and basic services to meet the growing demands of the population, as well as the tourism industry that directly impacts the local economy.

Investments in infrastructure are catalysts for economic growth as such advancements improve connectivity and efficiency while lending to the attraction of private investments and stimulate job creation. Modern infrastructure is a critical determinant for businesses to flourish in the region, while also establishing the region as an area that is ripe for new businesses and industries.

Access to basic services, such as healthcare, education, and clean water are fundamental components of regional development. Together, these services offer residents and the local workforce reliable living and working conditions which further enable economic development.

The expansion of careers pathways within healthcare, education, construction, and Blue Economy occupations will further serve the region's existing and expanding needs.

Industries that are vital to the region's economic success include:

- **Accommodations:** a core element of the area's history and economy, with links to every town in the region.
- **Construction:** a critical element of the local economy, providing solutions to social, climate, and energy challenges.
- **Healthcare:** a basic need for any economy and of particular note in relation to our region's aging population.
- **Water, Sewage, and Other Systems:** critical for infrastructure improvements; directly tied to workforce expansion, housing inventory, and regional development.

Investing in In-Demand Occupations

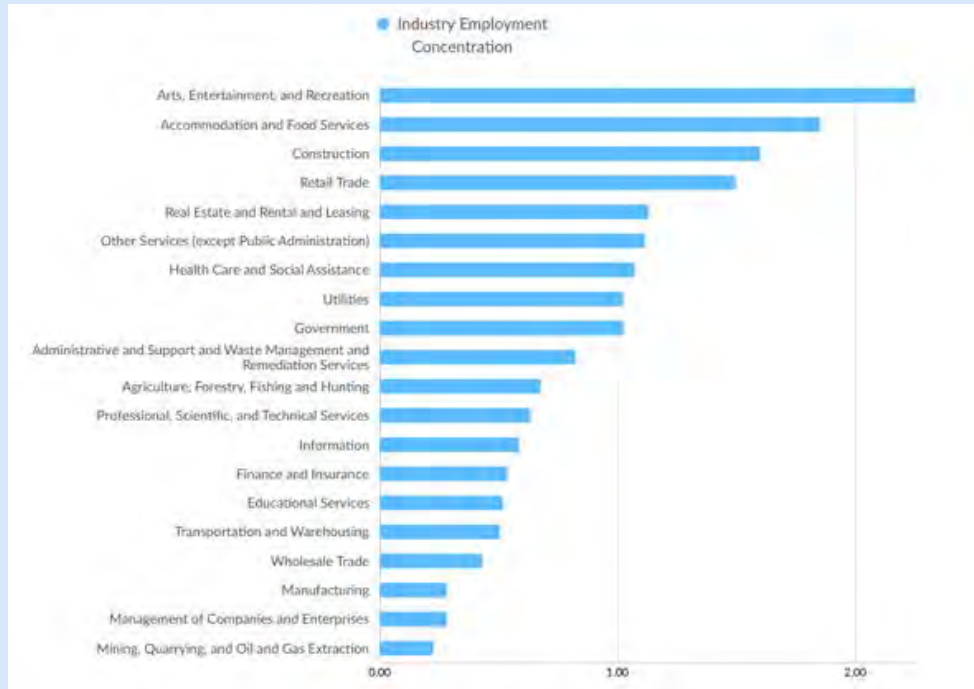
Encouraging investment in in-demand occupations will benefit employers and employees while contributing to the vitality of the local economy. Investments in healthcare, social services, and education occupations are essential for meeting our region's critical needs, improving quality of life, driving economic development, and addressing workforce shortages on the Cape and Islands.

Prioritizing pathways and trainings that align with in-demand occupations will help address short-term needs while laying the foundation for sustainable growth and long-term benefits for the region. As a result, investments in these occupations will create greater well-being and a more vibrant Cape and Islands community. Through maintenance of a robust workforce, reliable social support networks, and quality educational institutions, the Cape and Islands will continue to attract individuals, families, and businesses that choose to settle and invest in the region.

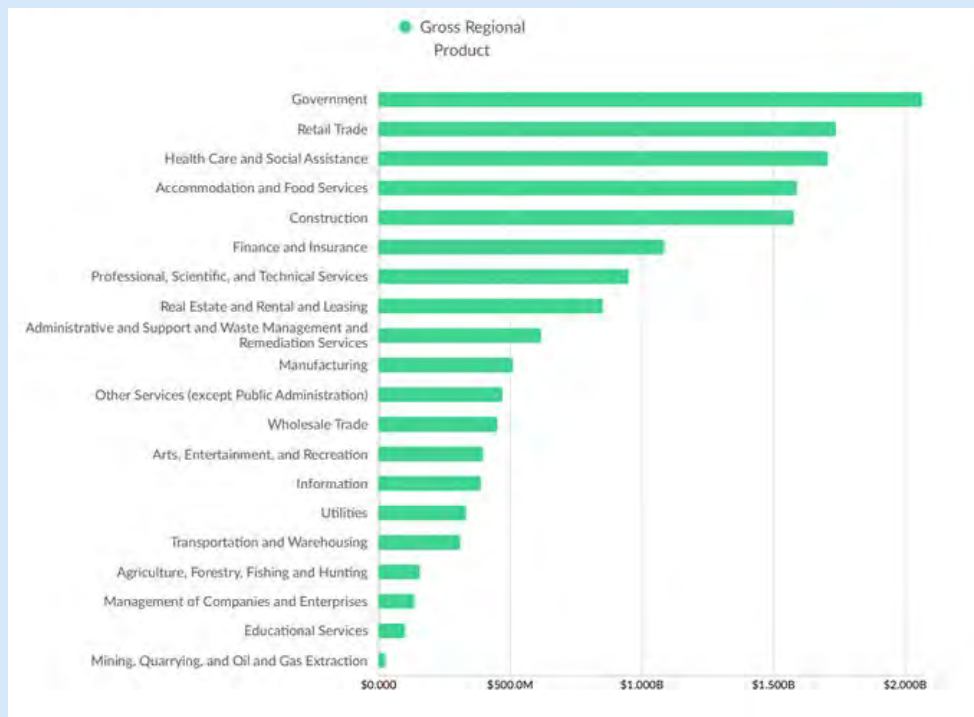
In-demand occupations in the Cape and Islands Region include:

- **Healthcare Practitioners, Technical Occupations, and Support Occupations**
- **Community and Social Service Occupations**
- **Education, Training, and Library Occupations**
- **Architecture and Engineering Occupations**
- **Protective Service Occupations**
- **Construction and Extraction Occupations**

Top Industry Employment Concentration

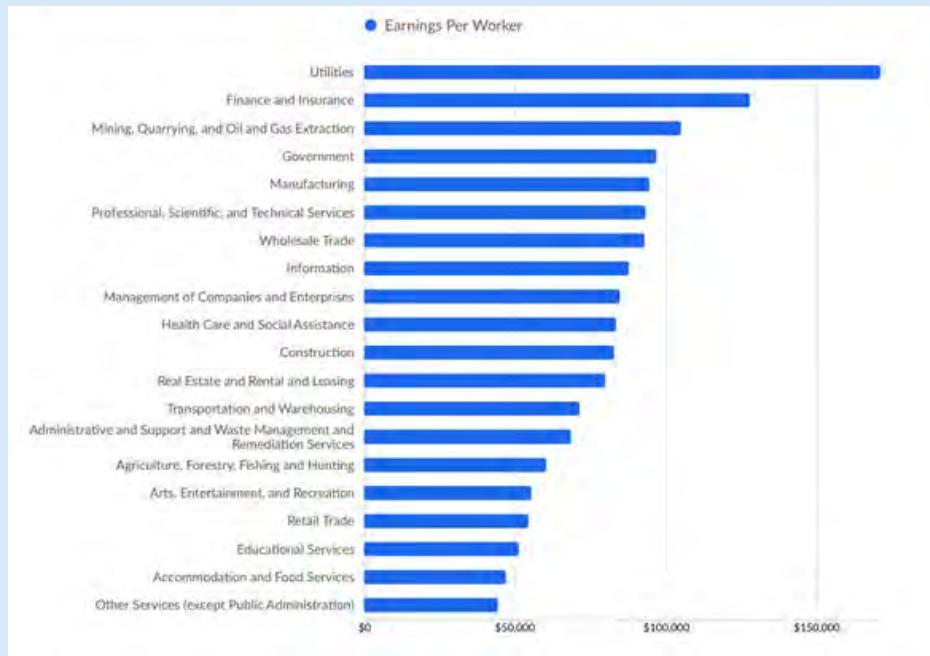


Top Industry Gross Regional Product

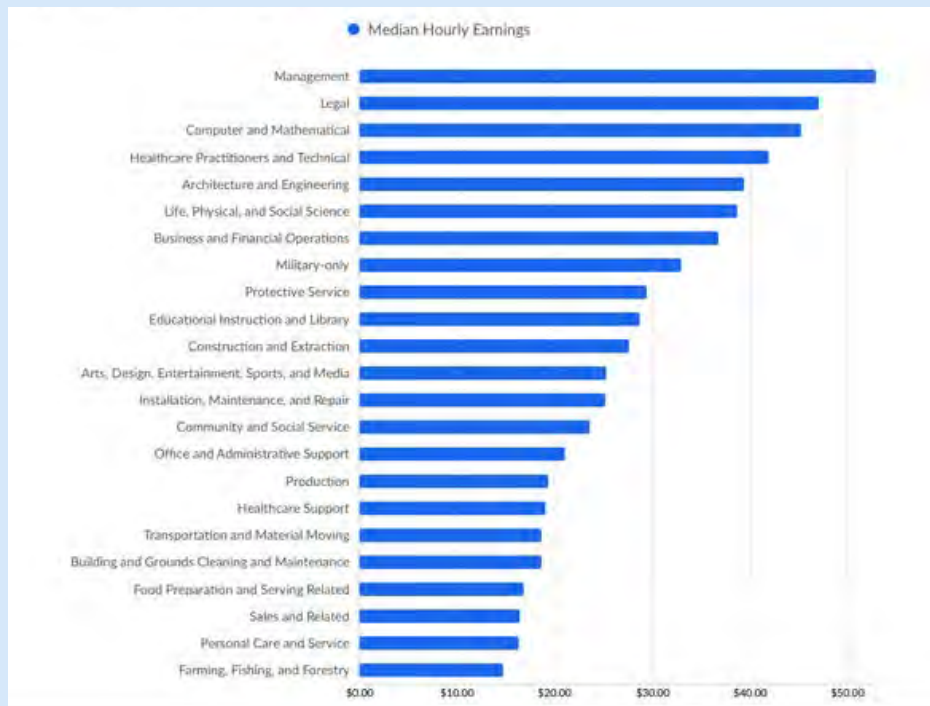


Sources: Lightcast Q2 2023 Data Set | lightcast.io

Top Industry Earnings

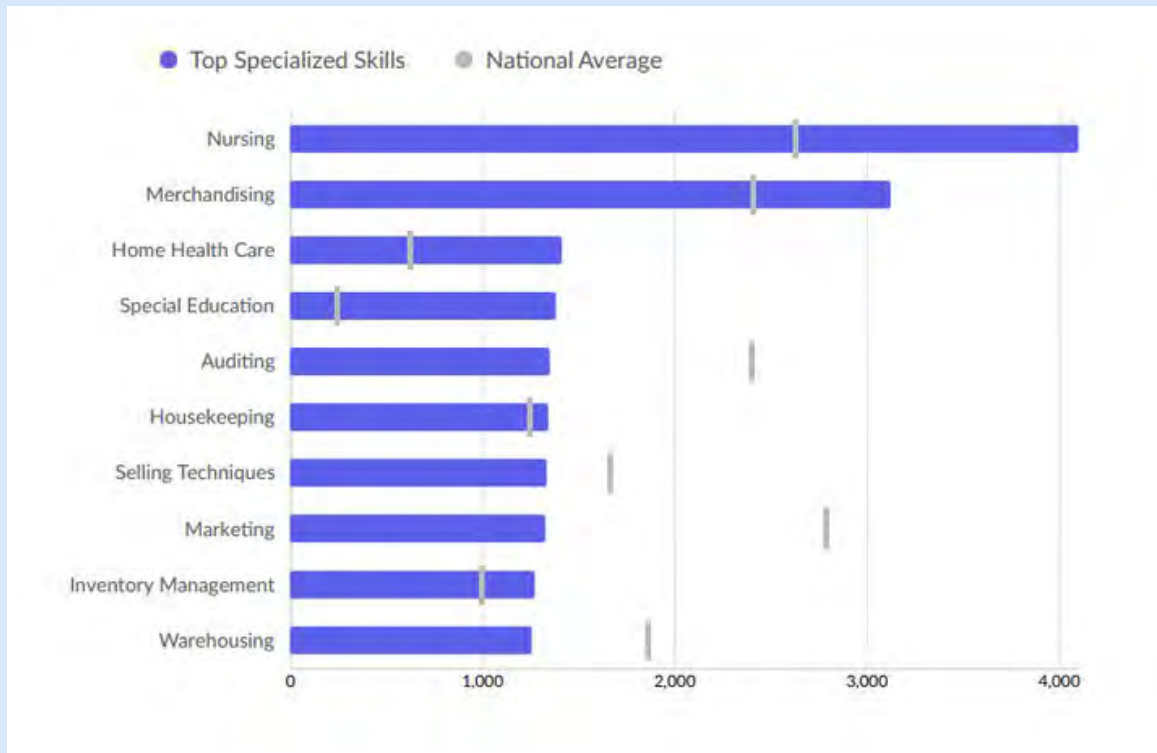


Top Occupation Earnings



Sources: Lightcast Q2 2023 Data Set | lightcast.io

In-Demand Skills



Top 10 Employers

Online profiles for workers record 26,620 companies as employers, with the top 10 highlighted below:

Cape Cod Healthcare
Woods Hole Oceanographic Institute
The Cape Cod Five Cents Savings Bank
Kinlin Grover Real Estate
Cape Cod Community College
Stop & Shop
Town of Barnstable
United States Coast Guard
Commonwealth of Massachusetts
Massachusetts Maritime Academy

Sources: Lightcast Q2 2023 Data Set | lightcast.io



STRENGTHS AND CHALLENGES



Regional Strengths

The Cape and Islands Region is a globally recognized 'brand.' A diversity of industry sectors, an expanding base of existing and emerging occupational opportunities, and a bevy of natural beauty and resources make the region a sought-after place to work and live.

The commitments that have been made to education, sustainability, and environmental stewardship are defining characteristics of the region. The combination of scenic beauty and a vibrant cultural scene set in one of America's oldest and most historic regions further distinguishes the Cape and Islands area.

Our beaches and diverse ecosystems attract domestic and international visitors, significantly contributing to our tourism industries, while our rich fishing and aquaculture history provide livelihoods for residents and area businesses.

In order to position the region to build on its collective strengths, the residents, employers, and institutions of the Cape and Islands cannot rest on past achievements. Continued collaboration among stakeholders is a must to encourage the future growth of area businesses, exposure to educational and skills training advancements, and to promote unified, modern day approaches to the area's challenges.

Hallmarks of the Cape and Islands Region include:

- Environmental Attractions
- Quality of Life
- Educated Population
- Marine Science Community
- Historical Resources
- Quality Healthcare
- Geography/Water Access
- Academic Institutions/Systems
- High Citizen Engagement
- Strong Non-profit Network
- Recreation
- Natural Resources
- Largest Coast Guard Station in the United States
- Arts and Culture
- Architecture
- Proximity to Boston/Providence
- Entrepreneurial Spirit
- Strong Community Leadership
- Technology
- Amenities/Tourism Outlets
- Access to funding
- Legislative Representation

Regional Challenges

The Cape and Islands Region boasts unparalleled collaboration and commitment when it comes to stakeholder involvement and cognizance of area challenges. While there is a great deal to celebrate, challenges persist that demand unified, innovative, and modern approaches.

In a rapidly evolving world, it is important to acknowledge these challenges to ensure the long-term sustainability and prosperity of the Cape and Islands. As our population grows, needs increase. Our roads, public transportation systems, and utilities will continue to face strain and congestion. This growth, coupled with limited housing stock and rising property prices, has resulted in affordability concerns for many residents and prospective workers who want to live where they work.

Additionally, the Cape and Islands is not immune to environmental challenges, despite its natural beauty. Climate change, sea level rise, and the potential for extreme weather events present risks to our coastal areas. The importance of prioritizing environmental sustainability and resilience in planning and decision-making processes will continue to be critical to the region.

The population increase of recent years, combined with aging infrastructure and a high cost of living, have heightened awareness around some potential threats in the coming years. Cooperation and collaboration among public and private sector stakeholders, as well as concerned community members, will be needed to develop comprehensive plans to address these concerns.

Challenges facing the Cape and Islands Region include:

- High cost of Living
- Access to Public Transportation
- Lack of Access to Affordable Housing
- Limited Housing Inventory
- Limited Demographic Diversity
- Traffic and Roadway Systems
- Wastewater Infrastructure
- Lack of Childcare Options
- High Energy Costs
- Workforce Shortages
- Aging Population
- Low Percentage of Millennials
- Aging Bridges
- Low Inventory/High Cost of Year-round Rentals
- Differing Zoning Policies
- Sole Source Aquifer
- Climate Change/Sea Level Rise
- Decline in Fish Stocks
- Nitrogen Loading



CONCLUSION

Conclusion

The tenets that drive the daily operations of the Cape and Islands Workforce Board - **Collaboration, Respect, Reliability, and Ingenuity** - are exemplified in the regional planning approach that was undertaken in development of this Regional Blueprint. The work put forth was done so with an eye toward exceptionalism in the region, the common denominator among participants from each sector and industry.

Population shifts, employment demands, and regional needs in housing and transportation have accelerated the conversation as to how the Cape and Islands economies transition post-Covid 19.

Demographic changes have impacted the needs and services of a more diverse Cape Cod and Islands region, demanding renewed attention to be placed on existing challenges while continuing to identify opportunities that are ripe for investment.

While conventional sectors continue to flourish, emerging needs and modern approaches may translate into a growing list of new industries being woven into the regional economic fabric.

The CIWB is grateful for the open dialogue that has been fostered with our strategic partners. These regional leaders continue to place importance on collaborating on the important endeavors that are necessary to reach our shared goals for the benefit of our entire region. Looking ahead, the CIWB will continue to intentionally solicit input from a variety of diverse stakeholders and perspectives.

The result contained here is a thorough and clear document that identifies assets and challenges, current and emerging trends, and strategies relative to the health and economic vitality of the Cape and Islands Region.





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