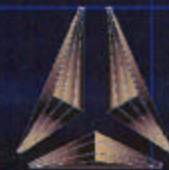


Northwest Triangle Initiative Market Assessment



Submitted to:
City of York Redevelopment Authority

Submitted by:
Delta Development Group, Inc.



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Executive Summary of Findings

- For purposes of this market assessment, the Northwest Triangle (NWT) project was assumed be a mixed-use development that will include apartments and town homes, office space, and retail and/or entertainment venues.
- A development that aligns with the stakeholders' current vision for the NWT site would likely require seeking alternate zoning for the entire site.
- We recommend engaging the Commonwealth's Brownfield Action Team (BAT) to seek priority designation with the Department of Environmental Protection to expedite environmental studies, cleanup and permitting.
- The York area was recently named in the top 100 "smart places to live" in the nation by Kiplinger's Personal Finance Magazine, with rankings based on things such as affordability, housing prices, job opportunities, and crime rates. We believe that with strategic partnerships, planning and implementation, opportunities abound for the York area to climb in ratings.
- The York area's location along the I-83 corridor... its rich heritage and historic ambiance... the diversity of the local residents... the transportation system... the quality of the workforce... all provide the ingredients for successful revitalization of the York area.
- The location of York in the "path" of growth heading north from the Washington D.C./Northern Virginia area presents additional opportunities for economic growth.
- The partnerships and planning efforts that are currently underway represent the beginnings of transformation, and strategically positioned, the Northwest Triangle can become the hub of development as a "gateway" linking downtown York and the new recreation complex, as well as a catalyst for future development along the Codorus corridor.
- The proximity of the Rabbit Transit's transfer station only a short distance from the NWT site will be a positive attribute to marketing the site to commercial and residential owners alike.
- The size and configuration of the NWT site would not likely support a retail component of sufficient size to be a shopping "destination", and would therefore likely primarily serve the day-to-day needs of local residents with the majority of customers living or working within a 3-minute drive of the site.
- Currently, residents within a 3-minute drive of the site have less than average incomes with significantly less spending power to support new retail establishments. Comparing estimated household spending by local residents to estimated sales by local retail establishments does not reveal a demand for additional retail from local residents.
- When the baseball stadium at the Proposed YORC site becomes a reality, and residential units are developed at the site that target young professionals and active adults, we believe there is an opportunity to create a market for restaurant/entertainment venues at the site. We estimate that these additions could support around 15,000



square feet of additional restaurant space. Restaurants could be further supported by the new daytime population associated with the potential office component at the NWT site.

- Consideration of an entertainment venue such as a small independent movie theater could add to the attractiveness of the area and provide additional foot traffic to help support restaurant development as well. There are currently 31 movie screens in York County and according to industry standards, the area could potentially support up to 40 screens.
- With an average travel time to work for York County residents of approximately 24 minutes, it is assumed that the majority of potential residents at the development would come from within a 25-minute drive of the site.
- Between 1995 and 2000, around 37 housing units per year were absorbed in the City of York, which is not indicative of a significant demand for residential development.
- The proposed town homes and apartments would likely target young professionals and empty nesters. Between 2005 and 2010, households within a 25-minute drive of the site between the ages of 15 to 30 are expected to increase by 613, while households between the ages of 30 to 35 are expected to decrease by around 1,000. In comparison, households between the ages of 50 and 64 are expected to increase by 5,667.
- With a net decrease of households between the ages of 15 and 35, there does not appear to be a demand for housing in this target age group. However, the opportunity exists to provide a housing option that could potentially capture the loss of some of the young households that are expected to leave the area. A housing option and amenities that would appeal to the 50-64 age group could present an opportunity to capture some of the growth in this age group to downtown housing.
- For purposes of assessing competitive office buildings, we assumed the York City area as the primary competitive market area. We identified the economic region most likely to influence future employment opportunities in the local area as York County and the surrounding counties of Cumberland and Dauphin in Pennsylvania, and Baltimore County in Maryland.
- There are currently approximately 387,000 square feet of office space available for lease within the York area, nearly half of which is expected to be competitive with the proposed NWT office component. Historical employment growth in York County does not indicate a significant demand for office space.
- The proposed mix of uses at the NWT site in a pedestrian oriented live-work-play environment could be attractive to employers looking to locate or expand in the area and potentially employ some of the approximately 30,000 York County residents who are currently leaving the County to work.
- We recommend the inclusion of a WiFi hotspot in the NWT redevelopment plan to maximize the site's attractiveness to both residential and commercial markets.



Background of the Project

Introduction

The Northwest Triangle Initiative (NWT) is a redevelopment project located in the heart of the City of York. Renaissance of this underutilized, Brownfield site is being championed by the City of York Redevelopment Authority (Authority) with funding and planning support from the PA Department of Community and Economic Development (DCED) and the York County Economic Development Corporation (YCEDC).

Envisioning an attractive, mixed-use development in the midst of this historic city, the Authority intends to leverage the existing momentum of several planned developments along the Codorus Creek to bring this project to life, including the adjacent York Baseball Stadium site. The Authority's goal is to take maximum advantage of the opportunities the site presents for creating a vibrant live-work-play environment in a prime, downtown location and spur additional investment and economic development in the City of York.

Community Profile

The City of York, our nation's first capital, is located in York County, PA, which lies on the Commonwealth's border with Maryland; significant development pressure is occurring from this neighbor to the south, which presents both opportunities and challenges to the local economic development community. The City was first surveyed and planned along the Codorus Creek, which was the genesis of its rich industrial growth and heritage. Today, remnants of that heritage can be found on the banks of the Codorus on the NWT site.

Unable to recapture its industrial past to this day, the City of York had an unemployment rate 68 percent higher than the state as recently as 2000. U.S. Census data from the year 2000 lists the City of York's unemployment rate at 9.6 percent while the state of Pennsylvania was listed at 5.7 percent.

Similarly, according to the 2000 U.S. Census, the median household income of the City of York was only \$26,475 or 34 percent less than the state median household income. Further, 20 percent of the families live below the poverty level. One of the primary goals of the NWT project is to help bring jobs and new investment back into the center city.

According to "River of Opportunity: A Comprehensive Land Use Study and Economic Development Plan for the Codorus Corridor", a study commissioned by the York County Commissioners and completed in January 2006, the Codorus Corridor is home to both the best and the worst that the City of York has to offer. Significantly, the Corridor slices through the City's urban core and is home to 35% of York County's minority population and 25% of its poverty. As such, development occurring at the NWT site must take these factors into consideration when the project partners are planning the mix of uses on the property.



Site Location and Adjacent Uses

A total of 45 acres and 87 properties comprise the Northwest Triangle site approved by the City of York Planning Commission on July 18, 2005. This Brownfield is generally understood to include both the Northwest Triangle site and the future location of the York Baseball Stadium. The Northwest Triangle proper comprises half of the total redevelopment area, or approximately 29.2 acres. The area is well served by public water and public sewer. Currently, York Rail Company rail lines traverse the northern, central, and south central sections of the site, bifurcating it and presenting significant development challenges to laying out a cohesive site that maximizes developable acreage. This developable acreage has been estimated at 8.685 total acres.

The term “Northwest Triangle” is used to describe the area bound by the banks of the Codorus Creek on the north and the west. Located to the north of State Route 74 (S.R. 74), the proposed development site lies in the center of the City of York, approximately 0.25 miles northwest of the City of York’s Continental Square, the City’s traditional center. The proposed stadium development site is just to the north of the Northwest Triangle. Because of this prime location, the NWT will become a primary “gateway” into the City of York; this presents the redevelopment with additional opportunities.

The historic Fairmount area, with its many distinctive Victorian homes, is located north of the site and across the Codorus Creek. Located on the west banks of the Codorus Creek and opposite the site is the Susquehanna Commerce Center and Barton Associates. Both of these buildings were once old, industrial sites recently redeveloped for office use. The North George Street corridor, east of the site, is primarily commercial. The York City central business district, with a blend of urban residential, commercial, and institutional property, is located to the south.

Future visitors to the NWT site will find the aforementioned York Baseball Stadium to the northeast, representing a significant new investment in downtown York. The 5,200-seat stadium in the city's Arch Street neighborhood has an anticipated summer 2007 opening. The development team has an opportunity to enhance the potential positive economic benefits to occur at this location by planning a mixed-use development that will take advantage of the new stadium and other adjacent uses.

The Northwest Triangle project area was designated as blighted by the York City Planning Commission on July 18, 2005. Blight certification and designation is due to the existence of what was then termed economically and socially undesirable land use.

Description and Site Assessment

Historical Use of Site

While the site has historically been mixed-use, its predominate use has been heavy to light industrial. Historic uses of site properties include: farm equipment manufacturing; auto



dealership and construction supply distributor; organic and inorganic pigment manufacturing; feed mills and utility pole storage yard; service station; heating oil distribution; auto body repair and used car sales; coal storage yards, rail lines and a small switching yard; and residential units. A large portion of the site was used for coal storage in the late 1800s and early-to-mid 1900s. The coal was stored on the ground surface, either uncovered or beneath wooden sheds.

Industrial development historically induced great economic development in this portion of the City of York. Much of the industrial development occurred with the expansion of the railroad in 1838. In 1870, the growth of E.G. Smyser's Variety Iron Works included a large office building and smaller buildings surrounding its site. Other businesses, such as Empire Car Works, began to populate the site in the late 1800s. By the turn of the century, two rail lines were servicing the site and remain to present day.

Also adjacent the site is the registered Fairmont Historic District. The historic district includes 202 residences that reflect the period of development from 1884 to 1933. Any future uses on the NWT site would be well served to consider consistencies in use and architectural style to this district to maximize its aesthetic potential.

Current Use of Site

Presently, several industrial operations are located throughout the Northwest Triangle site in addition to vacant Brownfield property. Operating businesses include Ohio Blenders, a feed mill manufacturer; B & C Fasteners; York Rail, Inc.; Thomas Somerville; Keystone Color Works; and William Kraft.

The York Rail Line runs along the Codorus Creek and bifurcates the site, presenting significant development challenges. Adjacent West Philadelphia Street and North George Street connecting to Route 462 and Interstate 83 provide vehicular transportation to the site.

Site Assessment

As part of the City's Strategic Comprehensive Plan of 1995, the NWT was targeted as an area in need of significant redevelopment. As currently proposed, the Northwest Triangle project will be a mixed-use commercial and residential development that will include apartments and town homes, office space, and various retail and entertainment venues.

Additionally, the development team has committed to extending a well-used greenway, the Codorus Heritage Rail Trail, to traverse the site and lead to the baseball stadium, to enhance the Codorus Corridor and connect the NWT site with complementary uses, including the proposed Kings Mill Technology Park. Currently, an effort is underway to re-zone sections of the project area to Commercial Waterfront.



The construction of the York City Baseball Stadium can be expected to have a positive impact on the proposed development of the Northwest Triangle site. By tying the two developments together, the City of York could potentially offer residents and baseball patrons with a well-planned, complementary, mixed-use development that includes office space, residential areas, retail, and entertainment venues. One particular challenge will be locating the appropriate mix of uses on the site that will appeal to a multicultural, multigenerational and mixed-income community.

While the site planning is still ongoing, it is envisioned that the waterfront property along the banks of the Codorus Creek will house the office space located on the site. Residential property is proposed near the center of the site with retail and entertainment facilities strategically located through the property.

Limiting/Attractiveness Factors

Physical Features

Development of the NWT site will be challenging due to the configuration of the land itself and additional constraints on usable acreage due to the site's rail line bifurcation, proximity to Codorus Creek, and adjacency to historic structures (e.g. churches and a cemetery). Out of a possible 29.5 acres, the site's master developer will be able to control only 8.685 acres, presenting a challenge to the developer's creativity and ability to provide a financially feasible development alternative.

Land Use / Zoning

The NWT's current zoning is a mix of Commercial Waterfront, Heavy Industrial, Central Business District and Open Space. To the site's advantage, the majority of the properties are located with an Enterprise Development Area (EDA) District, which is an overlay district that loosens restrictions to encourage commercial and industrial development on the site.

The City of York's planner, Jessica A. Martin, presented a zoning change proposal in a report entitled, "Redevelopment Area Plan for the Northwest Triangle," on December 12, 2005. After a study of the redevelopment area's current zoning and an analysis of what uses were currently permitted vs. the City's vision for the site, Ms. Martin concluded that significant changes were necessary to both the City's Comprehensive Plan and the site's existing zoning. In her estimation, current zoning falls short in the following ways:



- Heavy Industrial zoning is an inappropriate match for the future vision.
- Commercial Waterfront (CW) is more consistent with the redevelopment goals, but Commercial Waterfront limits height at 45 feet for all uses except hotels and does not permit 100% lot coverage. This will have implications on lot sizes due to the presence of rail lines and the vision of incorporating green space into the site plan along the Codorus.
- Parking structures are not permitted in the CW district; depending upon the uses ultimately selected by the master developer, the lack of available parking may hinder the site's usability.
- Residential uses are permitted in the EDA district; however, they are only permitted as a Special Exception as approved by the Zoning Hearing Board. Possibly because of the uncertainty of proceeding with seeking residential use approval through this means, the Planning Commission recommended against relying upon the EDA district to permit the desired residential uses.
- Because the EDA is an overlay district, certain provisions of the underlying zoning would still apply and present additional development challenges.

Due to these considerations and recommendations, the master developer will face a significant hurdle in seeking rezoning on the NWT site. It would be extremely difficult to approach development of the NWT site in a manner that aligns with the stakeholders' current vision without seeking alternate zoning for the entire site.

Political and Legal

Political support to any redevelopment plan is critical to its success, particularly when that plan can be anticipated to involve significant public funding and actions by public bodies and authorities (e.g. zoning changes, land development approvals).

The City of York and the Redevelopment Authority have done a good job of aligning the support of a number of key stakeholders in its quest to redevelop the Northwest Triangle site. These include:

- Congressman Todd Platts
- City of York Mayor John S. Brenner
- City of York Planning Commission
- York County Commissioners
- City of York Department of Community Development
- State Senator Michael Waugh
- State Representative Stephen Stetler
- York County Economic Development Corporation
- PA Department of Community and Economic Development



It will be important for the Redevelopment Authority and the master developer to work together to ensure that the redevelopment plan for the NWT site does not get lost in the clamor to support the development of the proposed York Baseball Stadium. Careful coordination with those stakeholders will go a long way towards solidifying the concept that the sites' uses are congruous and should be considered part of a larger vision for the City's urban core.

Additionally, the York County Economic Development Corporation (YCEDC) is in the process of developing a plan for the King's Mill site, the current location of York International and the former Smurfit Stone facility. This estimated 250-acre Brownfield site is located approximately a mile south of the NWT site and also lies along the Codorus Creek.

Both the NWT site and the King's Mill site were identified as 2 of 10 projects that could transform Codorus Corridor if carefully coordinated and planned. We strongly recommend that both development teams closely collaborate to plan the sites' redevelopment in a manner that complements one another rather than competing for end uses and public funding. The Codorus Heritage Rail Trail, if extended through the NWT site, would join it with the Kings Mill site, providing a convenient and uninterrupted means of traveling between the two sites by bicycle or foot.

Property Acquisition

The City of York has identified up to 17 existing properties that must be acquired in order to redevelop the NWT site. These include a mix of commercial businesses, parking lots/garages, and vacant lots. The City of York RDA currently has sales agreements on five properties, and a declaration of taking has been filed on another. While the Redevelopment Authority has been working diligently towards site control, it does not completely control all the necessary property on the NWT site. This presents challenges in terms of time, financial resources, demolition, and the developer's ability to begin the land development process.

While the Authority is seeking significant public funds in order to achieve the necessary level of funding to acquire the remaining properties, it has not yet been secured. This remains a significant hurdle to site redevelopment.

Additionally, should the funds not be made available, the Authority may consider exercising its eminent domain powers. This practice has come under intense scrutiny in recent years, and the state legislature has considered a number of proposals to limit the use of eminent domain for economic development purposes. The use of eminent domain risks the alienation of the general public or key stakeholders if not properly exercised or communicated to these individuals. We recommend careful consideration of this option and the employment of a risk/benefit analysis to identify the risks of exercising eminent domain on the NWT site. This will enable the team to weigh the risks against potential benefits and make the most informed decision possible.



Environmental

Years of heavy industrial use on the NWT site may present environmental remediation challenges to site redevelopment. For example, until the late 1990s, the Keystone Color Works facility chemically manufactured pigments using hazardous chemicals. Also, existing environmental research has uncovered the existence of several Underground Storage Tanks (USTs) throughout the site; no closure documentation was available for any of these tanks.

Key environmental assessments have not yet been completed for the entire site. Phase II and Phase III studies must be completed for two parcels on the NWT site. Completion of these studies will require a significant investment of time and financial resources. We recommend engaging the Commonwealth's Brownfield Action Team (BAT) to seek priority designation with the Department of Environmental Protection. This may afford the site some method of rapidly advancing Phase II/Phase III studies, environmental cleanup, and permitting. Additionally, BAT designation typically prioritizes sites for public funding through various state programs.

Infrastructure / Transportation

Public sewer and water currently serve the NWT site. It is likewise accessible by both pedestrian and vehicular traffic, primarily from West Philadelphia and North George Streets. Its center city location and proximity to the center square business district and existing Rail Trail will allow the site excellent pedestrian accessibility.

In order to realize the Authority's vision, West North Street and North Pershing Avenue must be connected to create an uninterrupted flow of vehicular and pedestrian traffic through the site. Additional improvements in the form of curb cuts, building pads and possibly parking structures are anticipated but not solidified at this time.

Public Transportation

In any urban location, good access to public transportation is a necessity for successful site development. Rabbit Transit, the City of York's public transportation provider, has a bus transfer station located only a short distance from the NWT site at Pershing Avenue and Philadelphia Street. The proximity of this transfer station will be a positive attribute to marketing the site to commercial and residential owners alike. Access to public transportation will accomplish several things on the site – reduce congestion on City thoroughfares, open the site to visitors from across the City due to the location of the transfer station, and provide a convenient means of moving site residents and workers to and from destination points.



Technology

While Broadband Internet access is currently available to the site within the City of York, the NWT site does not currently offer WiFi accessibility. WiFi, the leading standard for wireless networking, is a local area network (LAN) that uses high frequency radio signals to transmit and receive data over distances of a few hundred feet.

The presence of WiFi on the site would make it markedly more attractive to the target residential market of young professionals and any commercial uses on the site and enhance the goal of creating a vibrant live-work-play environment. We are recommending that the master developer include the installation of a WiFi hotspot in its NWT redevelopment plan to maximize the site's marketing potential to the target residential and commercial markets.

Market Assessment

Based on a preliminary look at local demographics, the competitive environment, and the location, size and configuration of the NWT site, we envision development of the site as the "hub" of a pedestrian-oriented neighborhood that leverages existing local amenities to offer a mix of residential, retail and office uses in a "live, work, play" environment. The proximity of the site to the proposed York Outdoor Recreation Complex (YORC), as well as to existing establishments in the downtown business district provides the opportunity for a mix of uses and configuration that will enhance the attractiveness of the development to young knowledge workers. This type of development can also be complementary to other developments proposed along the Codorus Creek Corridor.

The following pages present an overview of market factors and opportunities that helped to shape and support this vision for development at the site.

The Northwest Triangle Market Area

The retail, office and residential components of the proposed development will each draw from different geographic areas with different target markets. Our approach to the market study involved identifying the market area for each component, assessing key market indicators for each, and quantifying the potential for development of each component.

The Retail Market Area

The drawing power of the retail component of a development is typically driven by factors such as the size and/or tenant mix. The size and configuration of the NWT Site would not likely support a retail component of sufficient size to be a shopping "destination", and would therefore likely primarily serve the day-to-day needs of local residents. The International Council of Shopping Centers (ICSC) defines types of retail centers based on their size and tenant mix. For purposes of our retail market assessment, we have assumed that the majority of retail



customers would come from within a 3-minute drive (the Primary Market Area), with a secondary draw from within a 5-minute drive (the Secondary Market Area).

Retail components could include things such as restaurants, a bookstore, a coffee shop, a small entertainment venue, and a mix of miscellaneous specialty, convenience and service retail establishments. It is assumed that target retail customers will include neighborhood residents, the daytime population in close proximity to the site, visitors to the YORC, and the Primary and Secondary Market Areas. (See Map 1, page 12)

The Residential Market Area

The potential market area for residential housing at the NWT Site was primarily determined by assessing the distance local residents currently drive to work, as well as historic mobility patterns and local transportation corridors. In 2000, the mean travel time to work for York County residents, according to the U.S. Census Bureau, was around 24 minutes. Over half of residents who indicated that they had moved into York City since 1995 had moved from within York County. For purposes of assessing the market for residential development, we assessed indicators for a 25-minute drive-time, a 30-minute drive-time, and York County. (See Map 2, page 13)

Given the location of the NWT Site, it is assumed that residential units would be townhouses, condos, or apartments, and would not likely be attractive to families with young children. The target market for this type of development would likely be either young adults or mature adults -- "empty nesters".

The Office Market Area

In defining the study area to assess the market for office development, two primary factors were considered: (1) the geographic area considered to be "competitive" with the NWT Site; and (2) the geographic area from which the development could potentially draw tenants and/or workforce.

For purposes of assessing competitive office buildings, we assumed the York City area as the primary competitive market area. However, to gauge the potential of the local economy to support the development of additional new office space, a larger economic region was used. Commuting patterns of the local workforce was used to determine the geographic area of economic most likely to influence the local office market. As shown in the following tables, while 77 percent of York County residents work within the County, nearly 30,000 residents drive to the surrounding counties to work. Therefore, we have identified the economic region most likely to influence future employment opportunities in the local area as York County and the surrounding counties of Cumberland and Dauphin in Pennsylvania, and Baltimore County in Maryland. For comparison purposes, we have also included information from Baltimore City where relevant.



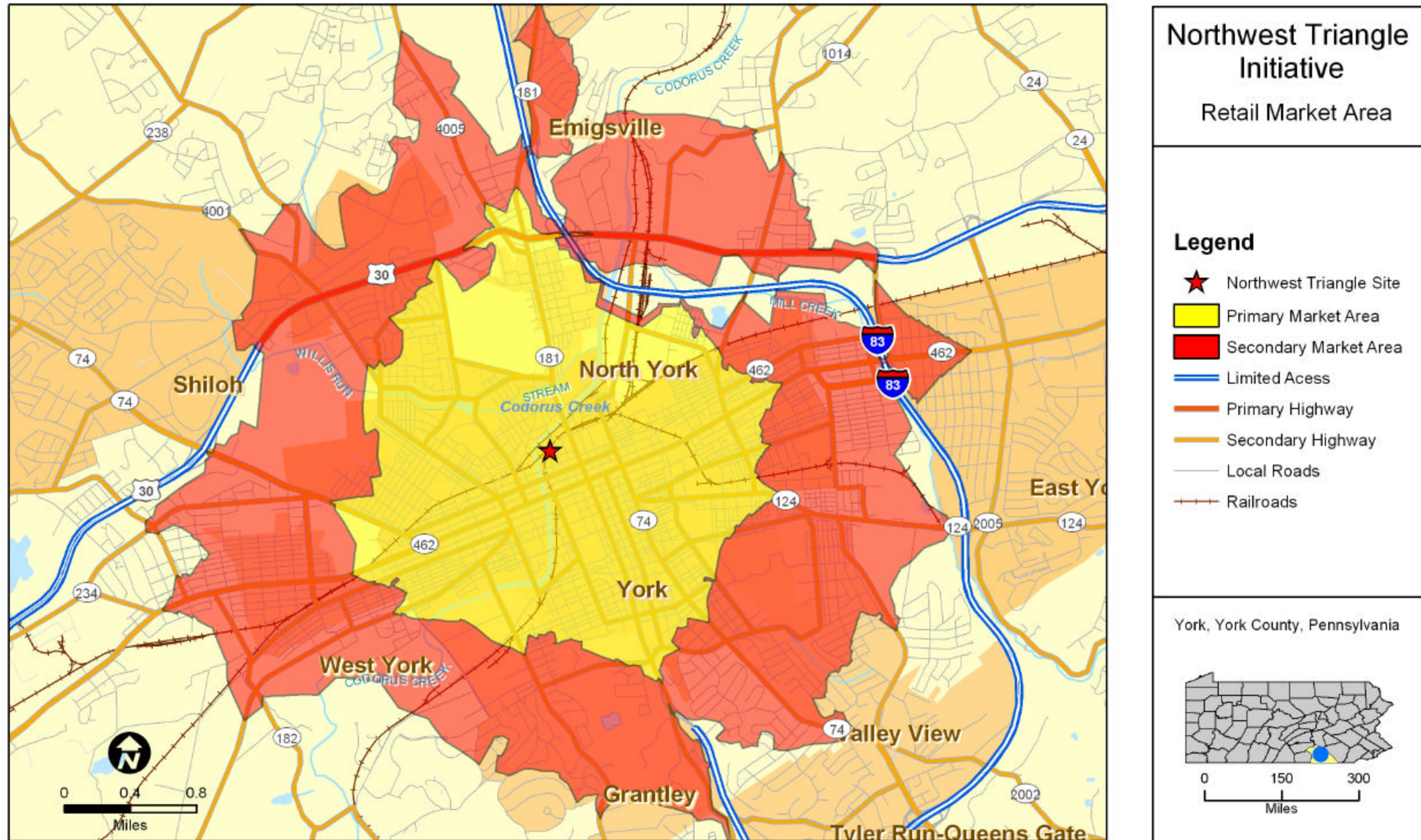
**Table 1
York County Workforce Commuting Patterns**

York Co. Residents Working In...	2000	% of Total	1990	% of Total	Change in Total 1990 - 2000
Total Workers	193,126	100.0%	174,782	100.0%	18,344
York Co., PA	142,104	73.6%	135,266	77.4%	6,838
Cumberland Co., PA	11,626	6.0%	10,051	5.8%	1,575
Dauphin Co., PA	9,848	5.1%	7,071	4.0%	2,777
Baltimore Co., MD	7,970	4.1%	6,605	3.8%	1,365
Lancaster Co., PA	5,485	2.8%	3,845	2.2%	1,640
Adams Co., PA	4,923	2.5%	3,454	2.0%	1,469
Baltimore City, MD	2,732	1.4%	1,891	1.1%	841
Harford Co., MD	2,201	1.1%	1,497	0.9%	704
Carroll Co., MD	1,815	0.9%	1,180	0.7%	635
Anne Arundel Co., MD	801	0.4%	547	0.3%	254
Other	3,621	1.9%	3,375	1.9%	246
York Co. Workers Living In...	2000	% of Total	1990	% of Total	Change in Total 1990-2000
Total Workers	169,372	100.0%	157,684	100.0%	11,688
York Co., PA	142,104	83.9%	135,259	85.8%	6,845
Adams Co., PA	11,152	6.6%	9,097	5.8%	2,055
Lancaster Co., PA	4,018	2.4%	3,359	2.1%	659
Cumberland Co., PA	3,807	2.2%	3,116	2.0%	691
Dauphin Co., PA	2,365	1.4%	2,208	1.4%	157
Baltimore Co., MD	925	0.5%	526	0.3%	399
Carroll Co., MD	658	0.4%	386	0.2%	272
Harford Co., MD	517	0.3%	454	0.3%	63
Other	3,826	2.3%	3,279	2.1%	547

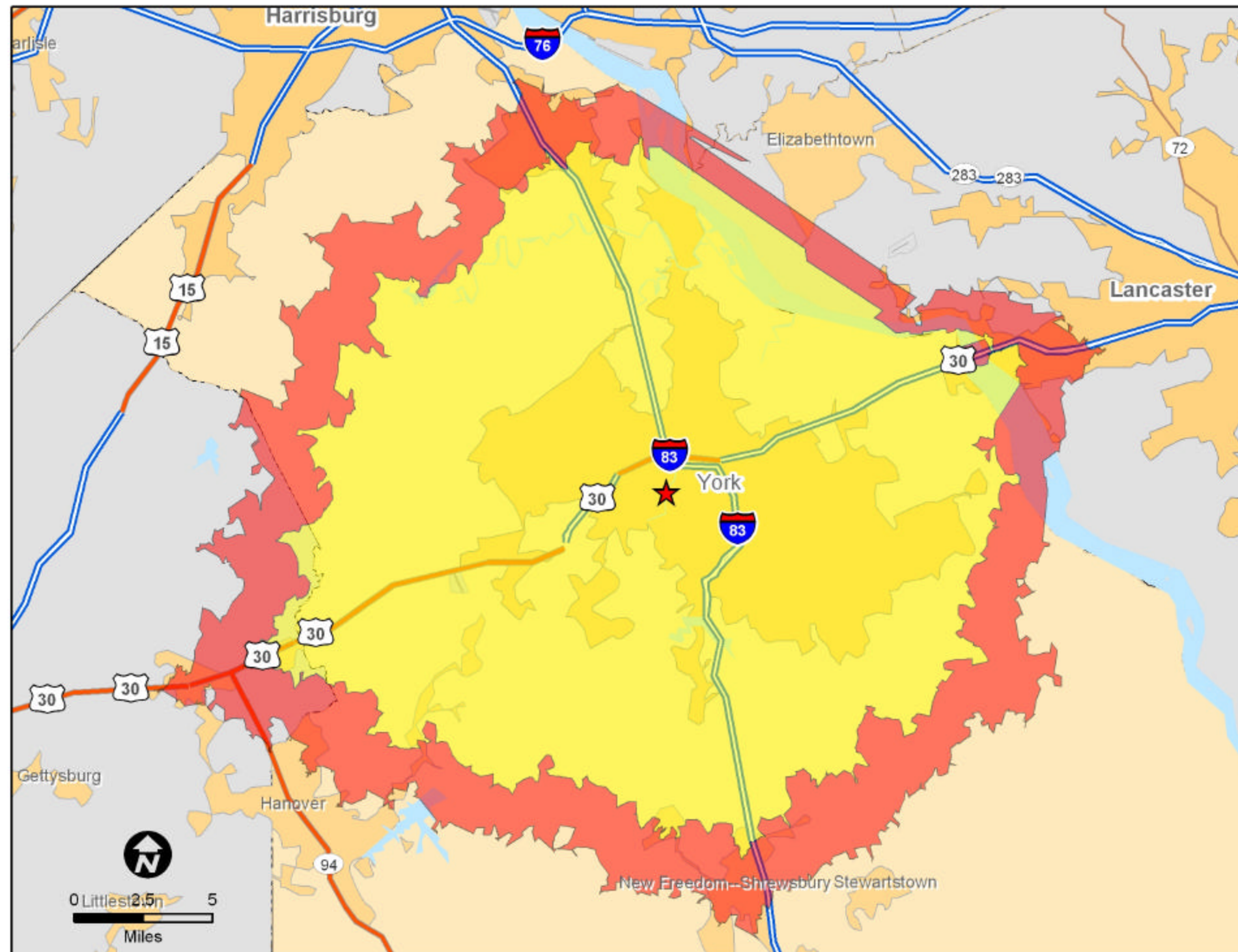
Source: U.S. Census Bureau



Map 1



Map 2



Northwest Triangle Initiative

Residential Market Area

Legend

- ★ Northwest Triangle Site
- Primary Market Area
- Secondary Market Area
- Limited Access Highway
- Primary Highway
- Secondary Highway

York, York County, Pennsylvania

0 150 300
Miles

Demographic Profile

In measuring the market for a mixed use development at the NWT Site, a review of demographic indicators and trends gives insight into characteristics of the people who live in the market area – the people who will be customers of the retail center and who will be the workforce that attracts new employers to the area. Our demographic profile includes an assessment of:

- Population Trends & Comparisons
- Income Trends and Comparisons
- Housing Characteristics
- Resident Mobility

Population

The York area was recently named in the top 100 “smart places to live” by Kiplinger’s Personal Finance Magazine, with rankings based on things such as affordability, housing prices, job opportunities, and crime rates. For employers looking to expand or relocate, the area is attractive because of its geographic location, the quality of its transportation system, and the availability of quality of job applicants. These factors have likely driven recent population growth in the area. A look at population trends and projections clearly shows York County as an area within the state that is expected to see a significant growth in population between 2000 and 2010, with a projected growth rate of 10.6 percent, compared to an expected 3.4 percent growth rate statewide. Even though York City’s population decreased between 1990 and 2000, it is expected to increase as well between 2000 and 2010.



**Table 2
Change in Total Population**

	1990 (Actual)	2000 (Actual)	2005 (Estimated)	2010 (Projected)	% Change 1990 - 2000	% Change 2000 - 2010
3-Minute Drive-Time	40,263	39,442	40,046	41,373	-2.0%	4.9%
5-Minute Drive-Time	61,938	61,035	62,199	64,339	-1.5%	5.4%
25-Minute Drive-Time	243,465	270,145	282,984	296,395	11.0%	9.7%
30-Minute Drive-Time	288,861	321,980	338,355	355,010	11.5%	10.3%
York City	42,192	40,863	41,406	42,776	-3.1%	4.7%
York County	339,574	381,751	402,362	422,157	12.4%	10.6%
Dauphin County	237,813	251,798	256,599	262,191	5.9%	4.1%
Cumberland County	195,257	213,674	223,056	232,198	9.4%	8.7%
Baltimore (MD) ⁽¹⁾	1,428,148	1,405,446	1,418,579	1,443,432	-1.6%	2.7%
PA	11,881,643	12,281,054	12,480,871	12,694,533	3.4%	3.4%
U.S.	248,709,873	281,421,906	298,727,898	317,430,845	13.2%	12.8%

Source: U.S. Census Bureau and ESRI BIS

⁽¹⁾ **Includes both Baltimore County and the City of Baltimore**



Age Distribution

Age distribution and trends within the study are also important in examining the potential for a mixed use development. The age of various segments of the population can indicate the capacity of the younger workforce to replace the retiring workforce, as well as the potential level of disposable income a household is likely to have, and the types of goods and services they are likely to purchase.

The median age of residents in and near the City of York (31.5) is lower than in the surrounding area; however, it is expected to increase to 32.4 by 2010. Cumberland County has the highest median age in the study area at 38.1, expected to increase to 41.6 by 2010. The following tables show age comparisons and distributions in the study areas.

**Table 3
Change in Median Age**

	2000	2005	2010
3-Minute Drive-Time	30.5	31.0	31.4
5-Minute Drive-Time	33.2	33.9	34.9
25-Minute Drive-Time	37.5	39.3	40.9
30-Minute Drive-Time	37.5	39.3	40.9
York County	37.8	39.7	41.3
Dauphin County	37.8	39.5	40.8
Cumberland County	38.1	40.1	41.6
Baltimore (MD) ⁽¹⁾	36.5	37.7	39.1
PA	38.0	39.5	41.0
U.S.	35.3	36.3	37.3

Source: U.S. Census Bureau and ESRI BIS

⁽¹⁾ **Includes both Baltimore County and the City of Baltimore**



**Table 4
Age Distribution of Residents (2000)**

	3- Minute Drive- Time	5- Minute Drive- Time	25- Minute Drive- Time	30- Minute Drive- Time	York County	Dauphin County	Cumberland County	Baltimore (MD) ⁽¹⁾	Pennsylvania	United States
Total Population	39,442	61,033	270,143	321,983	381,751	251,798	213,674	1,405,446	12,281,073	281,421,906
0-4	7.9%	7.2%	6.1%	6.2%	6.1%	6.2%	5.5%	6.2%	5.9%	6.8%
5-14	16.0%	14.7%	14.0%	14.3%	14.4%	14.1%	12.7%	14.0%	13.8%	14.6%
15-24	17.6%	16.0%	12.2%	12.0%	11.7%	11.5%	14.4%	13.6%	13.0%	13.9%
25-34	15.1%	14.8%	13.5%	13.4%	13.1%	13.6%	12.6%	13.8%	12.7%	14.2%
35-44	14.5%	14.6%	16.6%	16.9%	17.2%	16.5%	15.9%	16.0%	15.9%	16.0%
45-54	11.2%	12.0%	14.1%	14.2%	14.6%	14.9%	14.7%	13.7%	13.9%	13.4%
55-64	7.2%	7.9%	9.3%	9.3%	9.4%	9.0%	9.4%	8.7%	9.2%	8.6%
65-74	5.1%	6.3%	7.3%	7.1%	7.1%	7.4%	7.6%	7.1%	7.9%	6.5%
75-84	3.9%	4.9%	5.1%	5.0%	4.8%	5.1%	5.4%	5.2%	5.8%	4.4%
85+	1.5%	1.6%	1.7%	1.7%	1.6%	1.7%	1.8%	1.6%	1.9%	1.5%
65+	10.5%	12.8%	14.2%	13.8%	13.5%	14.2%	14.9%	14.0%	15.6%	12.4%

Source: U.S. Census Bureau and ESRI BIS

⁽¹⁾ **Includes both Baltimore County and the City of Baltimore**



Household Income

Another key factor in assessing both the housing and the retail market is household income. As shown in Table 5, the median income in York County of \$53,254 is higher than the national and state median, and with the exception of Cumberland County at \$56,532, is higher than the surrounding area. York City and the area immediately surrounding the NWT Site have the lowest median incomes at \$30,937 and \$30,577, respectively. Figure 1 shows the relative change in median income in the study areas as compared to the change in the U.S. as a whole, and Table 6 shows median income by age of householder.

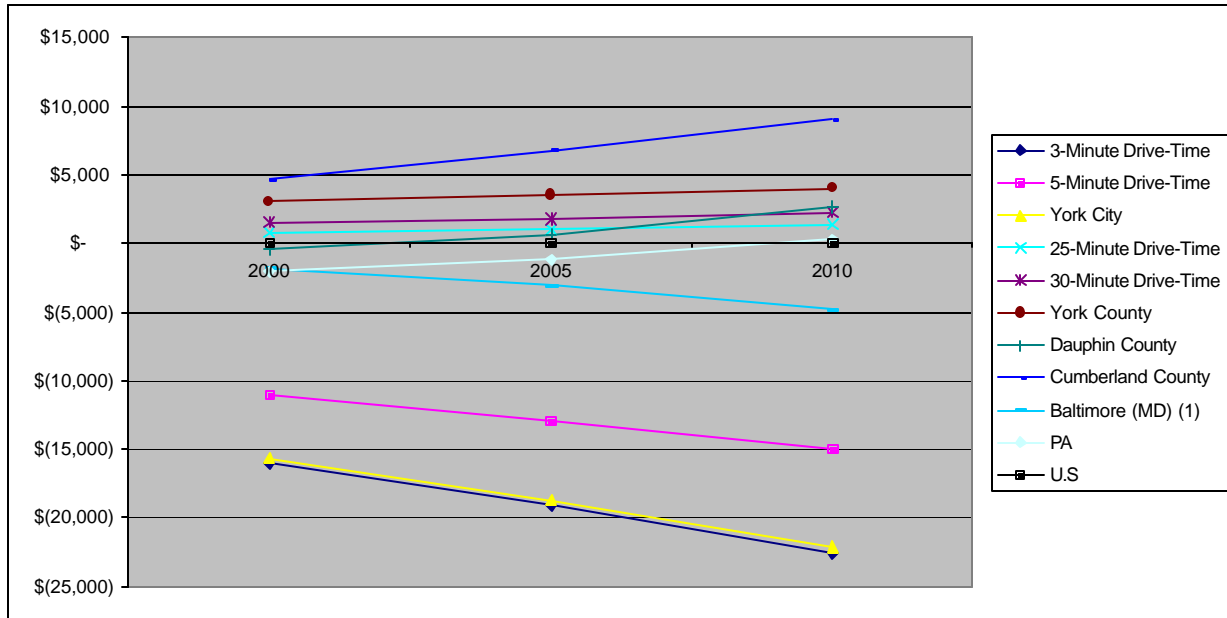
**Table 5
Change in Median Household Income**

	2000	2005	2010
3-Minute Drive-Time	\$26,106	\$30,577	\$35,745
5-Minute Drive-Time	\$31,139	\$36,828	\$43,322
York City	\$26,454	\$30,937	\$36,200
25-Minute Drive-Time	\$42,903	\$50,821	\$59,856
30-Minute Drive-Time	\$43,725	\$51,587	\$60,626
York County	\$45,261	\$53,254	\$62,390
Dauphin County	\$41,657	\$50,420	\$61,070
Cumberland County	\$46,766	\$56,532	\$67,427
Baltimore (MD) ⁽¹⁾	\$40,337	\$46,660	\$53,611
PA	\$40,108	\$48,534	\$58,658
U.S.	\$42,164	\$49,747	\$58,384

Source: U.S. Census Bureau and ESRI BIS

⁽¹⁾ **Includes both Baltimore County and the City of Baltimore**

**Figure 1
Relative Change in Median Household Income**



Source: U.S. Census Bureau and ESRI BIS

(1) Includes both Baltimore County and the City of Baltimore

**Table 6
Income by Age of Householder (2000)**

Householder Age	3-Minute Drive-Time	5-Minute Drive-Time	York City	25-Minute Drive-Time	30-Minute Drive-Time	York County	Dauphin County	Cumberland County	Baltimore (MD) (1)
15-24	\$20,787	\$23,684	\$21,208	\$32,678	\$33,276	\$34,194	\$29,062	\$28,540	\$45,344
25-29	\$31,655	\$36,808	\$32,163	\$47,609	\$48,457	\$48,729	\$45,711	\$47,539	\$33,097
30-34	\$32,437	\$38,418	\$33,028	\$49,321	\$50,147	\$50,747	\$47,339	\$49,359	\$33,749
35-39	\$35,832	\$42,587	\$36,076	\$57,931	\$58,879	\$60,528	\$57,271	\$66,416	\$39,727
40-44	\$36,098	\$43,417	\$36,391	\$59,066	\$59,966	\$61,736	\$59,067	\$67,865	\$40,205
45-49	\$38,449	\$47,858	\$38,774	\$67,221	\$67,927	\$69,865	\$70,494	\$75,971	\$42,704
50-54	\$37,220	\$47,254	\$37,568	\$67,362	\$68,032	\$70,054	\$70,975	\$76,673	\$42,594
55-59	\$32,194	\$40,088	\$32,664	\$57,007	\$57,748	\$59,651	\$59,634	\$67,283	\$38,612
60-64	\$31,764	\$39,601	\$32,373	\$56,344	\$57,085	\$58,970	\$58,643	\$67,237	\$37,302
65-69	\$24,877	\$31,195	\$25,934	\$36,642	\$36,398	\$37,225	\$36,171	\$42,885	\$27,442
70-74	\$23,466	\$30,436	\$24,472	\$36,167	\$35,902	\$36,453	\$35,101	\$42,190	\$26,086
75-79	\$20,360	\$24,632	\$21,227	\$28,116	\$27,856	\$28,564	\$29,287	\$32,508	\$22,285
80-84	\$18,162	\$22,573	\$19,025	\$25,847	\$25,696	\$26,069	\$27,802	\$31,357	\$20,692
85+	\$17,659	\$22,781	\$18,381	\$25,547	\$25,499	\$25,586	\$27,115	\$30,406	\$20,901

Source: U.S. Census Bureau and ESRI BIS

(1) Includes both Baltimore County and the City of Baltimore



Housing Characteristics

During the four-year period between 1995 and March 2000, approximately 147 new housing units were built in the City of York, for an average of around 37 units annually. Like many urban areas across the county, the housing stock in York City is older than in the surrounding suburban areas. The following tables and figures present the age of housing, as well as the types of housing in York City as compared to the surrounding area.

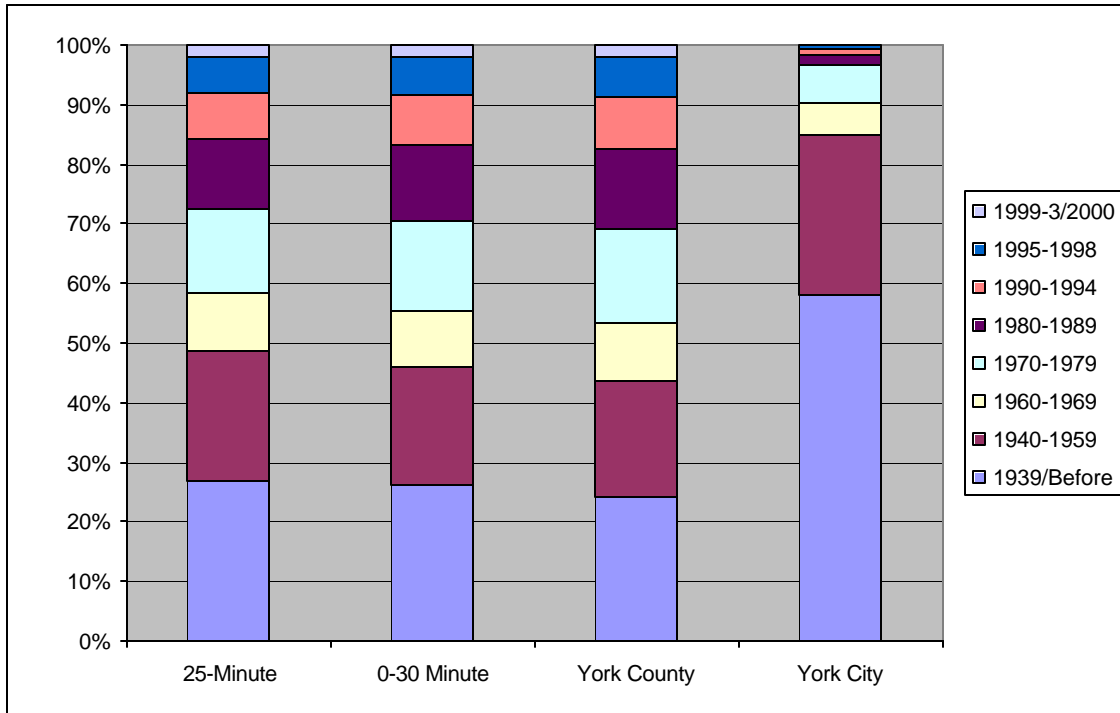
**Table 7
Age of Housing Stock**

Year Built	25-Minute Drive-Time	0-30 Minute Drive-Time	York County	York City
1939/Before	26.8%	26.0%	24.0%	57.9%
1940-1959	21.7%	20.1%	19.5%	27.0%
1960-1969	9.9%	9.4%	9.8%	5.4%
1970-1979	14.1%	15.0%	15.6%	6.2%
1980-1989	11.7%	12.8%	13.5%	1.9%
1990-1994	7.7%	8.2%	8.8%	0.8%
1995-1998	6.1%	6.5%	6.6%	0.7%
1999-2000	2.1%	2.0%	2.1%	0.1%

Source: U.S. Census Bureau



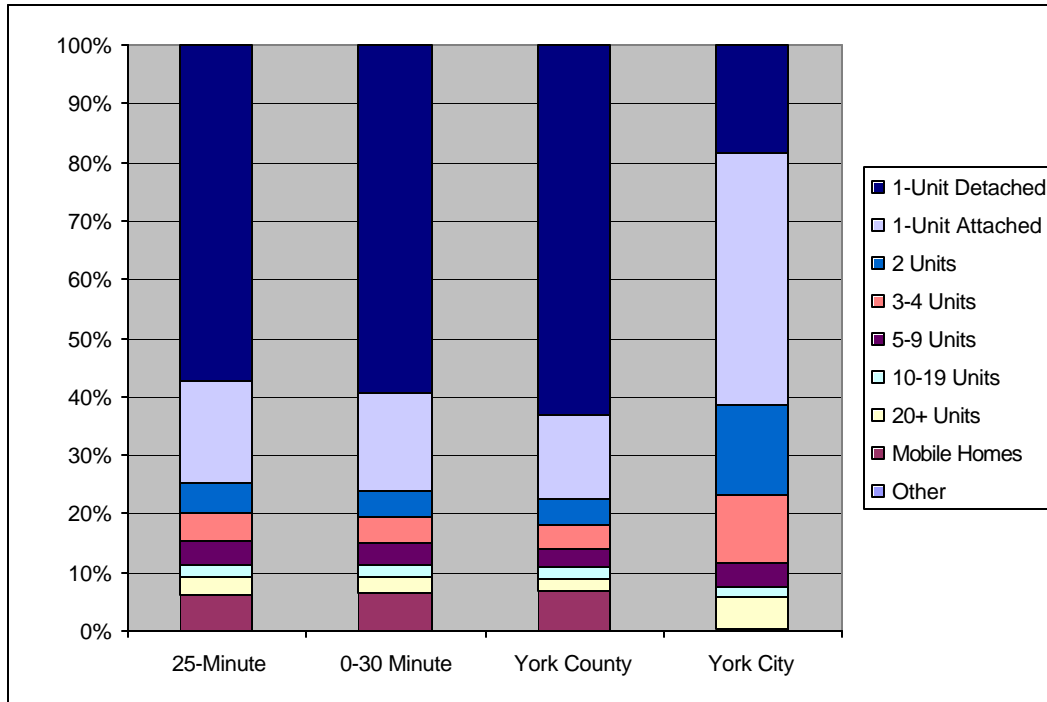
**Figure 2
Age of Housing Stock**



Source: U.S. Census Bureau



Figure 3
Types of Housing Units



Source: U.S. Census Bureau

Economic Environment

In this section, economic base technique becomes the theoretical framework for taking a more in-depth look at York County’s economy. Introduced in the 1920s, economic base theory is a popular tool for analyzing key drivers in the local economy. The theory assumes that the economy is comprised of two primary sectors – basic (i.e. export) and nonbasic (i.e. local). Export industries are considered primary drivers of economic growth because they inject new money into the economy, increasing demand for local goods and services (p 116)¹. Expansion of a region’s export base produces an influx of capital, some of which is captured by local businesses that supply the basic factors of production: labor, fixed assets, and raw materials. Business-to-business spending invigorates the local economy, giving workers greater discretionary spending power. And as a result, local merchants and service industries benefit

¹ Klosterman, Richard E. 1990. Community Analysis and Planning Techniques. Savage: Rowman & Littlefield Publishers, Inc.

from the boon in export sales. The “ripple effect” created by export sales means that a decline in export activity could have widespread impacts on the local economy.

In economic base theory, nonbasic sectors are portrayed in stark contrast to basic sectors. If production in a nonbasic sector is insufficient to meet local demand, the need must be met with imports. Imports can be a drain on local resources, largely because every dollar spent on imported goods and/or services benefits the economy of the *producing* region. In this respect, nonbasic sectors do little to stimulate additional *local* industrial output. This revenue leakage imports represent is a lost opportunity for diversifying the local economy. Communities can reverse this leakage through import substitution. But to do so, communities must have a business climate that supports entrepreneurial development.

Economic base theory considers basic (i.e. export-oriented) industries to be of central importance to a region’s economic development. But for growth to be sustainable, export activity must be supported by diverse local economies that invest in new business formation. The dynamic, mutually supportive relationship between export and import activity, a fundamental component of economic base theory, provides a useful context for understanding local market dynamics. The following pages profile the region’s basic and nonbasic sectors. Industries with strong export potential are identified with a quantitative technique known as location quotient analysis. After these economic drivers have been identified, shift-share analysis is used to determine which industries exhibit potential for future expansion.

Location Quotient Analysis

Developed in the 1940s, the location quotient approach is widely used for estimating sectors with a strong export orientation. By comparing a local industry’s share of total employment to a larger reference region’s share of total employment, the resulting ratio indicates relative strength. The higher an area’s location quotient, the more specialized its industry relative to the reference region. Location quotients in excess of 1.0 are thought to engage in some measure of export activity. As the location quotient increases, it is assumed that more industrial output is produced for export. For purposes of this analysis, York County and the other three (3) counties in the study area use the State of Pennsylvania as the reference region. The formula for calculating location quotients is as follows:

$$\frac{e_i}{e_T} \div \frac{E_i}{E_T} = \text{Location Quotient (LQ)}$$

The terms are defined as follows:

- e_i = County Employment in Industry *i*
- e_T = Total County Employment
- E_i = Pennsylvania Employment in Industry *i*
- E_T = Total Pennsylvania Employment



The location quotient approach is geared toward identifying basic sectors, those industries that return a ratio greater than 1.0 ($LQ > 1.0$). These industries employ a larger share of the workforce than their reference region, which indicates a degree of local specialization. This specialization also indicates that output is exceeding local demand, which means industry is exporting product outside the local area. Larger ratios identify industries with higher levels of export activity. According to economic base theory, these basic sectors underpin the local economy and as such, it is critical to understand the dynamics that shape their current and future growth. A location quotient less than 1.0 ($LQ < 1.0$) captures industries that are not generating sufficient output to meet local demand. These industries present an opportunity for import substitution, provided the local economy has the business climate for building competitive advantage.

Data Sources

Location quotient analysis is derived from county-level data supplied by Minnesota IMPLAN Group (MIG, Inc.). MIG, Inc. maintains a comprehensive database of employment records for 509 industrial sectors, with coverage at the national, state, and sub-state levels. MIG, Inc. uses three primary sources to develop its employment estimates:

1. Covered Employment & Wages (ES-202). A program of the U.S. Bureau of Labor Statistics, ES-202 captures quarterly employment and annual wage information for private sector employees at the national, state, and county levels. Certain types of workers, such as federal employees and self-employed persons, are excluded from the ES-202 program.
2. Regional Economic Information System (REIS). The U.S. Bureau of Economic Analysis manages this survey-based data, which provides industry-specific wage and salary information for states, counties, and metropolitan areas. According to some estimates, the ES-202 program only captures 40 percent of all agricultural employment, principally because many of the nation's farms are family owned and operated and therefore exempt from the ES-202 program. REIS helps to close the gap by providing estimates of total part- and full-time agricultural employment.
3. County Business Patterns (CBP). Like the ES-202 program, this database excludes most government workers, self-employed persons, and agricultural production employees. The U.S. Census Bureau releases industry level employment data by established size class, which allows users to estimate sector-level employment that is otherwise excluded from the ES-202 program due to federal non-disclosure rules. MIG, Inc. data releases lag behind the federal and state government, but they are more comprehensive than any individual data source, making IMPLAN a good choice for conducting location quotient analysis.

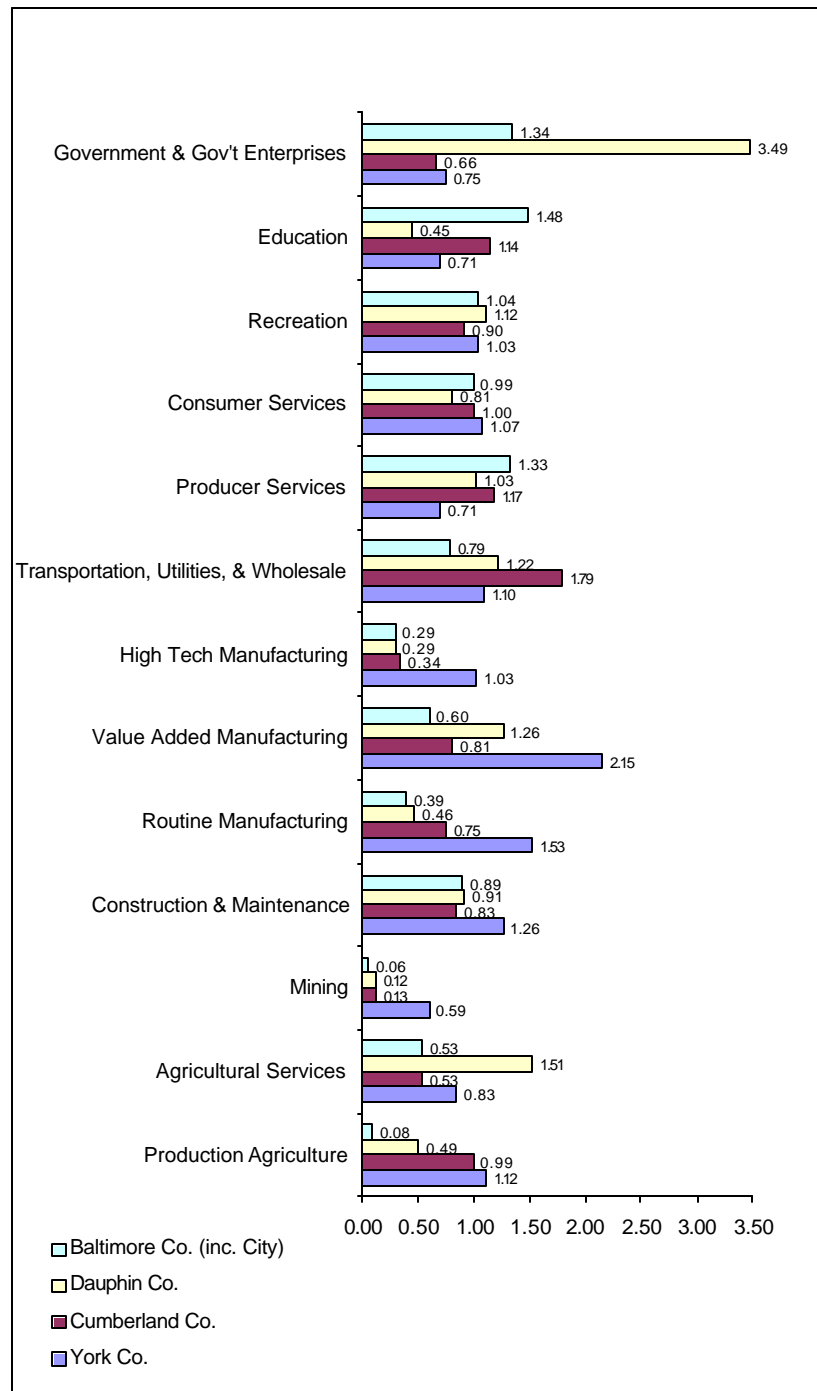


Facts & Findings

Figure 4 presents location quotient (LQ) results for all counties in the study area. The resulting ratios reflect the comparative strength of various industries as compared to their performance Statewide. When looking at location quotients, it is important to consider results in context. For instance, federal and state government are both considered basic sectors, regardless of their LQ. This is because they are supported by taxes collected *beyond* the local area. Similarly, industries that are primarily driven by local consumer demand, such as construction and real estate trade, are not necessarily basic sectors because they return a LQ greater than 1.0. A strong location quotient can be indicative of export activity, but it can also be reflective of rapid expansion in the local market. To be effective, location quotient analysis must be interpreted with an understanding of local market dynamics.



Figure 4
Location Quotients Analysis
Reference Region: Pennsylvania



Source: Minnesota IMPLAN Group, Inc. (2006)



Shift-Share Analysis

Location quotient analysis categorizes industries by their level of export potential. Because export-oriented industries drive spending for local goods and services, they are often the focus of targeted economic development efforts. Location quotient analysis can uncover import substitution opportunities that will expand a community's ties to the regional economy. But it cannot uncover which basic and nonbasic sectors have the greatest potential for future growth. That requires an assessment of competitive potential via shift-share analysis.

Shift-share analysis differentiates among sectors that are gaining (or losing) employment due to statewide economic trends, local economic conditions, and the overall mix of industries at the state level. The **three components** of shift-share analysis are:

State Share. Job growth that is mostly attributed "state share" signifies industries that have benefited from a healthy state economy. These industries would probably sustain the most job losses during a recession because they have a weak connection to the local economy. State share is also reflection of statewide job growth. From 2001 to 2005, total employment in Pennsylvania dropped from 19,685 to 19,181, yielding a negative growth rate of -1.28 percent. Local industries that track this negative growth trend are reflecting "state share."

Industry Mix. Industry mix is a means of accounting for the influence other industries have upon the local business climate. In this case, negative values are indicative of industries that have been losing jobs at a faster rate than the jobs losses experienced statewide. Positive values highlight sectors that have experienced negligible job losses – and in some cases, indicate sectors that far surpass the State in terms of overall employment gains.

Competitive Advantage. Competitive advantage is the most notable factor of shift-share analysis. It assesses local conditions and the degree of influence they exercise over industry gains and losses. Industries that outpace their reference region counterparts are believed to exhibit *local* competitive advantage.

Industries that attribute a significant share of new job growth to local factors should be central components of a community's economic development strategy. In contrast, it is more difficult for local policy to shape industries that are largely influenced by state share and industry mix.

Data Sources

Quarterly Workforce Indicators (QWI) provided the source data for this section. Like ES-202 data, QWI data does not include self-employed workers or independent contractors. However, it does supplement ES-202 files with state administrative records and U.S. Census Bureau data, which make it the most comprehensive data source for tracking workforce dynamics. The U.S. Census Bureau began publishing QWI data in – and the public access web site (<http://lehd.dsd.census.gov/led/datatools/qwiapp.html>) only queries employment records from

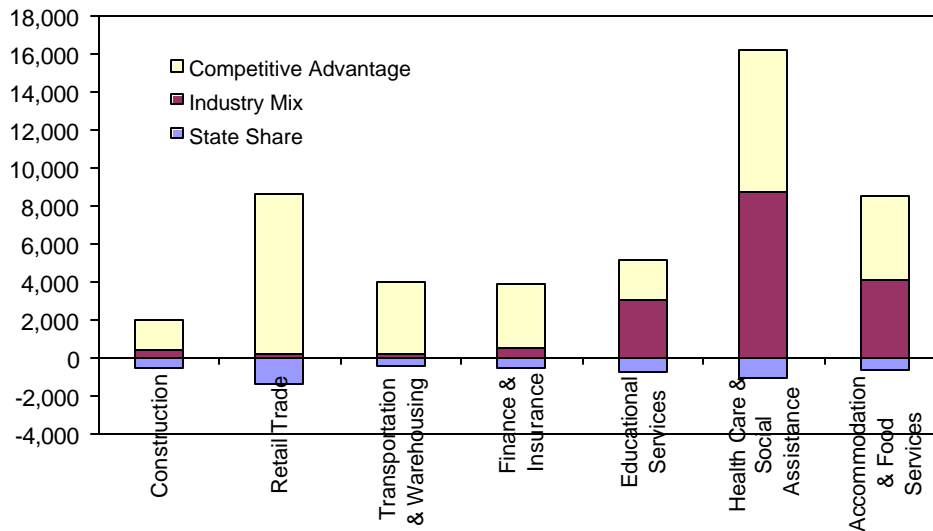


2001 forward. For this reason, the shift-share analysis relies upon 1st quarter employment comparisons for 2001 and 2005. Again, Pennsylvania served as the reference region.

Facts & Findings

Figure 5 presents selected shift-share results for the 4-county region. The bar chart makes it possible to compare industry performance on two levels: (1) Employment Growth and (2) Shift-Share. Figure 6 allows for a comparison between regional shift-share analysis and local shift-share analysis.

**Figure 5
Shift-Share Analysis for the 4-County Region**



Source: Quarterly Workforce Indicators (QWI), U.S. Census Bureau

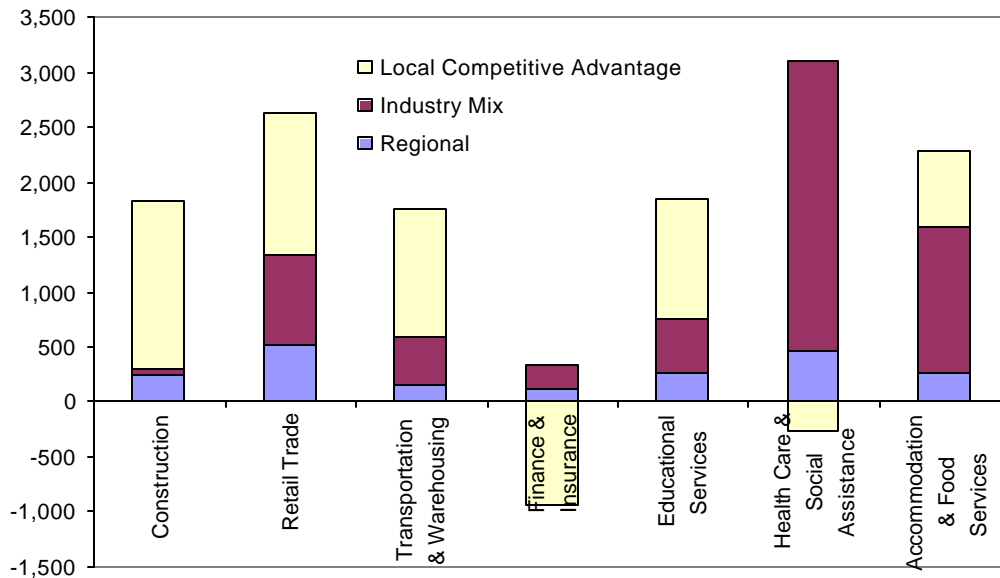
- **Health Care & Social Assistance** tops the region’s list of locally competitive industries. In terms of real job growth, the sector captured 72 percent of the employment opportunities created between 2001 and 2005. Over this time period, employment growth exceeded 21,000.
- **Accommodation & Food Services** was the only other competitive sector that registered double-digit growth. From 2001 to 2005, total employment grew from 50,274 to 58,188 – a growth rate of 16 percent. In contrast, Pennsylvania’s Accommodation & Food Services sector grew by just 7 percent. Despite their strong performance, neither sector has a strong export orientation. Hospitals are the region’s largest players in the health care sector. But their missions dictate a focus on community health – not clinical research and/or applied research, both factors that would broaden the sector’s export



potential. Accommodation & Food Services also reflect the local market, which lacks the type of robust tourism economy that would generate export activity.

- The **Finance & Insurance** sector presents an opportunity for future expansion, provided strategies are implemented to strengthen its competitive position. Unlike most sectors, Finance & Insurance did not mirror its statewide counterpart. From 2001 to 2005, Pennsylvania lost 762 jobs in this sector. In contrast, the 4-county region picked up 3,316 jobs – a 7 percent rate of growth. The sector’s strong location quotient (LQ= 1.17) is indicative of export opportunity.

Figure 6
Shift-Share Analysis for York County



Source: Quarterly Workforce Indicators (QWI), U.S. Census Bureau

- In many respects, the York County shift-share analysis stands in stark contrast to the regional results. Figure 6 shows that strong performers do not always translate their success from the regional economy to the local community. Representing nearly one-quarter of total employment, **Manufacturing** is a dominant player in York County’s economy. Unfortunately, this sector has witnessed sustained job losses, both locally and regionally. Despite having the infrastructure to support industrial expansion, York County cannot overcome the influence of regional contraction. Despite being a dominant employer, manufacturing does not emerge as locally competitive industry.



- From 2001 to 2005, **Health Care & Social Assistance** accounted for nearly one-third of all employment growth in York County. Over 4 years, the industry grew by 16 – on par with regional growth trends. Despite these positive gains, shift-share analysis reveals that the industry’s growth spurt is largely attributable to the region’s industry mix. Local economic factors are actually a drain on this sector.
- Competitive advantage exerts a positive influence on **Accommodation & Food Services**, but industry mix is clearly the driving force being its job growth.
- At the regional level, competitive advantage exerted a positive influence on the Finance & Insurance sector. In contrast, York County’s economy has a negative competitive advantage, which means that local factors are a constraining influence on its growth.

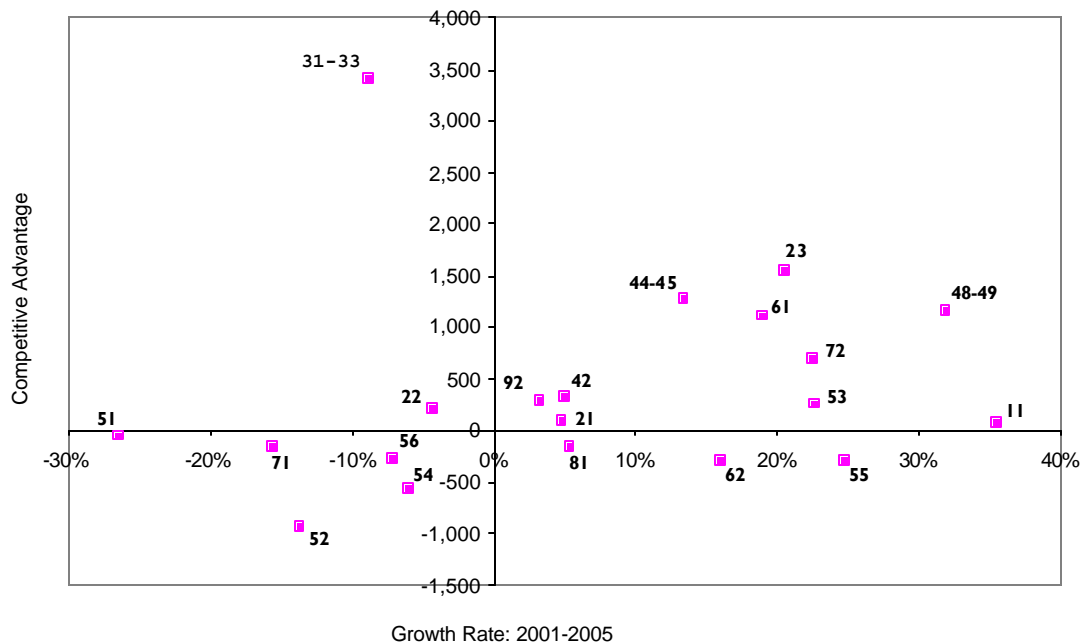
Industry Competitiveness

For economic development practitioners to make informed decisions, they need a solid interpretation of the quantitative analysis. On their own, location quotient analysis and shift-share analysis are practical analytical tools. But on their own, they do not create a complete picture. To create a complete picture, both indices must be considered in context of the regional economy. Figure 7 and Table 8 represent an effort to summarize the economic base analysis in a clear and concise fashion. The “x” axis charts the growth rate of each major industry sector in York County. The “y” axis charts each sector’s competitive advantage. The resulting scatter plot highlights sectors that have significant potential for future growth as well as those sectors in long-term decline. Charting industries in this fashion also helps identify clusters that may require focused attention in order to realize their growth potential. As a result of this analysis, York County’s twenty (20) major industry sectors were categorized into one of four (4) major categories:

1. High Performers. These clusters continue to sustain competitive advantage. They may require ongoing monitoring, but should not be the focus of an aggressive economic development strategy.
2. Established Sectors. These sectors are showing modest (or even negative) employment growth. Statewide industry trends may limit future expansion, with the exception of isolated markets.
3. Weak Performers. These sectors do not exhibit signs of local specialization and do not constitute a significant share of the labor market.
4. Potential Growth Targets. These sectors exhibit strong employment growth - growth that outpaces industry counterparts at the regional level. Local competitive advantage can be strengthened to yield a strong return on investment.



Figure 7
Industry Competitiveness in York County



Source: Quarterly Workforce Indicators (QWI), U.S. Census Bureau

Note: Legend information for the above chart can be found in Table 8 on page 33.



Table 8
Industry Competitiveness in York County

NAICS Code	Industry Sector	Location Quotient York County vs. PA	Total Employment 1st Qtr. 2005	Percent (%) of Total
HIGH PERFORMERS			64,550	38.2%
23	Construction	1.2569	10,793	6.4%
44-45	Retail Trade	1.2691	22,309	13.2%
48-49	Transportation & Warehousing	1.1111	7,286	4.3%
61	Educational Services	0.7052	11,712	6.9%
72	Accommodation & Food Services	1.1222	12,450	7.4%
ESTABLISHED SECTORS			53,113	
11	Agriculture, Forestry, Fishing & Hunting	1.0129	425	0.3%
21	Mining	0.5891	462	0.3%
31-33	Manufacturing	1.3804	40,344	23.9%
42	Wholesale Trade	1.0430	7,218	4.3%
92	Public Administration	0.7548	4,664	2.8%
POTENTIAL GROWTH TARGETS			30,599	
55	Management of Companies & Enterprises	0.9566	2,989	1.8%
62	Health Care & Social Assistance	0.9045	20,499	12.1%
81	Other Services (except Public Admin.)	1.3537	5,587	3.3%
53	Real Estate, Rental, & Leasing	0.4657	1,524	0.9%
WEAK PERFORMERS			20,699	
22	Utilities	1.4073	743	0.4%
51	Information	0.5017	1,605	0.9%
52	Finance & Insurance	0.4882	3,898	2.3%
54	Professional, Scientific, & Technical Services	0.5596	5,278	3.1%
56	Admin. Support, Waste Mgt. & Remediation Services	0.5693	7,272	4.3%
71	Arts, Entertainment & Recreation	0.6813	1,903	1.1%
TOTAL			168,961	

Labor Market Analysis

The U.S. Bureau of Labor Statistics (BLS) utilizes worker flow files published by the U.S. Census Bureau to estimate the geographic extent of Labor Market Areas (LMAs). The BLS defines LMAs as “economically integrated areas” where people can find work within a reasonable commuting distance and where people have the ability to change jobs without changing their primary place of residence. LMAs are updated every 10 years when new commuting data is made available through the U.S. Census Bureau. Small LMAs must satisfy one of the following criteria: (1) At least 25 percent of a county’s *resident* workforce must commute to another county for work; or (2) At least 25 percent of a county’s total workforce must be comprised of workers commuting *from* another county. The 2000 U.S. Census is the best source for commuting pattern data, which is obtained from the long form survey. The survey is distributed to a representative sample of the U.S. population. Results are compiled into worker flow files of all fifty (50) states and their respective counties. Worker flow files define commuting patterns for two primary groups of people, including the (1) *resident workforce* and the (2) *total workforce*. By comparing these two groups, an analyst can determine if a county is

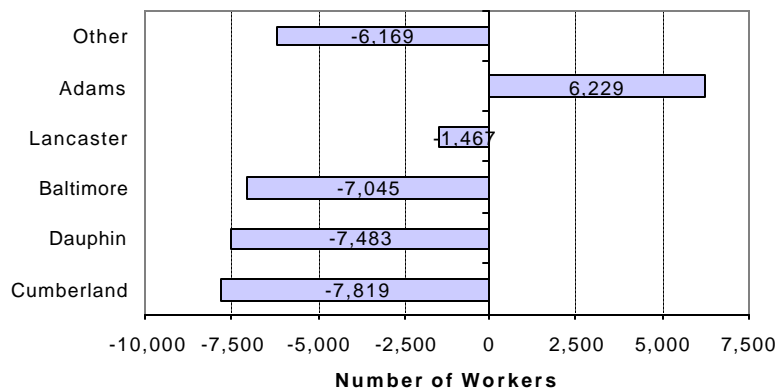
a net importer or a net exporter of workers. The data also verifies the geographic extent of LMAs.

As indicated in Figure 8, seventy-four percent (74%) of York County's resident workforce travels within the County to work. Only 16 percent of its entire workforce is comprised of non-residents. Both factors establish York as a single-county LMA.

**Figure 8
Worker Flows for York County**



**Figure 9
Net Gain/Loss of Workers in York County**



Source: Worker Flow Files, U.S. Census Bureau



As illustrated in Figure 9, Adams County is the only county in the region that contributes a net flow of workers to York County. Commuting patterns indicate that roughly 4,900 York County residents commute to Adams County. In turn, over 11,000 Adams County residents make the daily commute into York County. These commuting flows produce a net influx of some 6,200 workers, establishing York as the more dominant center of employment. York County has an opportunity to expand its primary laborshed within the surrounding region, capitalizing upon the capacity of Adams County's workforce.

From a labor perspective, York County is fairly isolated from the rest of the region. Its workforce capacity comes from within and as such, the County needs a workforce development program that strengthens labor force capacity "from the inside out" – and which enhances ties to the Adams County economy. Being part of a larger LMA would be a competitive advantage for York County because business would have some assurance that labor resources are available.

Workforce Distribution

The "Top 10" employers in York County appear in Table 9. The data is published on a quarterly basis by Pennsylvania's Center for Workforce Information and Analysis. The list underscores the central importance of manufacturing to York County's economy. As shown in Table 10, over one-quarter of the County's labor force is employed in manufacturing, a sector that has been losing competitive position at the national, State, and local level. At 31 percent of the labor force, consumer services is clearly the largest employer in York County. Among its top performers are Health Care & Social Assistance and Retail Trade, both of which have taken prominent positions on York County's "Top 10" list. Retail trade has lost some momentum Statewide, but it is showing positive gains at the regional and local levels. It is also a sector for which York County is competitively positioned in the region. Health Care & Social Assistance has experienced double-digit growth in recent years. But locally, this sector does not exhibit strong signs of competitive advantage and its nonbasic orientation suggests that it lacks an export focus.



**Table 9
Top 10 Employers in York County
2nd Quarter 2005 (Initial Data)**

Rank	Name of Employer	Type of Business	Industry Sector
1	Defense Distribution Center	Distribution center for military requisitions managed by Defense Logistics Agency (DLA)	Government
2	York Hospital	Community teaching hospital serving Southcentral Pennsylvania	Health Care & Social Assistance
3	Harley Davidson Motor Co.	National manufacturer of specialty motorcycles	High Tech Manufacturing
4	York County	York County Government	Government
5	Wal-Mart Associates, Inc.	National retailer of general merchandise & household goods	Retail
6	Giant Foods Stores, LLC	National grocery store retailer	Retail
7	York International Corp.	Independent supplier of Heating, Ventilation, Air Conditioning, & Refrigeration Systems	Routine Manufacturing
8	UTZ Quality Foods, Inc.	National manufacturer of snack food products	Value Added Manufacturing
9	Hanover General Hospital	Community hospital serving the Greater Hanover Area	Health Care & Social Assistance
10	Sheppard R H Inc.	Supplier of iron components for wide variety of industrial applications	Routine Manufacturing

Source: Center for Workforce Information & Analysis, PA Department of Labor & Industry



Table 10
Distribution of York County's Workforce

	Total Employment	% of Total
AGRICULTURE	3,126	1.55%
Production Agriculture	2,182	1.08%
Agricultural Services	944	0.47%
MINING	418	0.21%
CONSTRUCTION & MAINTENANCE	14,330	7.09%
New Construction	11,878	5.87%
Building Maintenance & Repair	2,452	1.21%
ROUTINE MANUFACTURING	13,284	6.57%
Textile & Apparel Products	1,276	0.63%
Furniture & Fixtures	893	0.44%
Rubber, Plastics & Miscellaneous	1,889	0.93%
Stone, Clay, & Concrete	1,501	0.74%
Primary & Fabricated Metals	6,244	3.09%
Motor Vehicles & Equipment	837	0.41%
Misc. Manufacturing	644	0.32%
VALUE ADDED MANUFACTURING	10,832	5.36%
Food & Kindred Products	5,344	2.64%
Tobacco & Leather Products	12	0.01%
Lumber & Wood Products	985	0.49%
Paper & Allied Products	4,491	2.22%
HIGH TECH MANUFACTURING	14,966	7.40%
Printing, Publishing & Allied	2,053	1.02%
Industrial Machinery & Equipment	7,040	3.48%
Electronics & Other Electrical Equipment	1,961	0.97%
Instruments & Related	3,364	1.66%
Chemicals & Allied Products	548	0.27%
TRANSPORTATION, UTILITIES, WHOLESALE	16,925	8.37%
Transportation	8,779	4.34%
Utilities	1,186	0.59%
Wholesale	6,961	3.44%

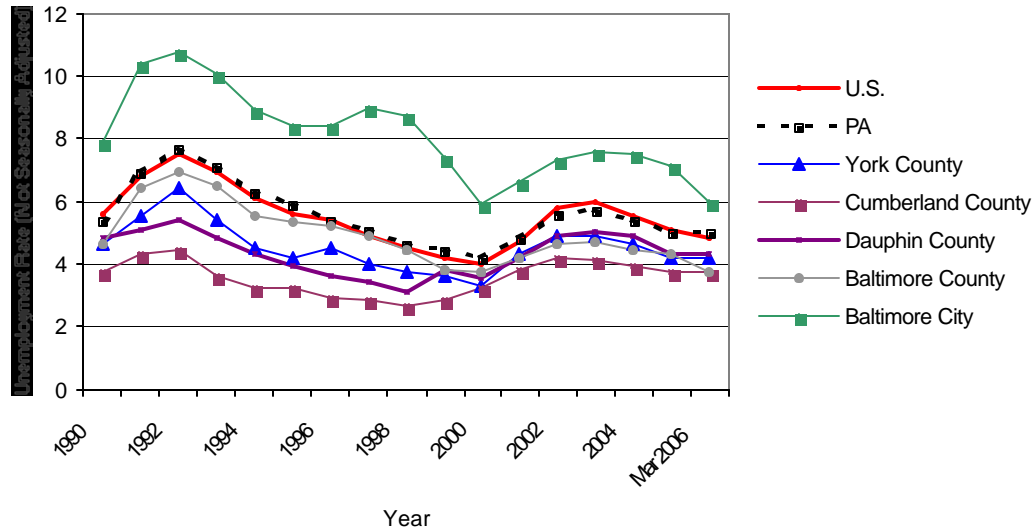
	Total Employment	% of Total
PRODUCER SERVICES	29,278	14.48%
Information	1,911	0.94%
Finance & Insurance	4,635	2.29%
Real Estate Rental & Leasing	2,427	1.20%
Professional, Scientific, & Technical Services	6,645	3.29%
Business, Legal, & Engineering	13,661	6.76%
EDUCATION	10,978	5.43%
RECREATION	16,413	8.12%
Accommodation & Food Services	14,224	7.03%
Amusement & Recreation	2,188	1.08%
CONSUMER SERVICES	62,799	31.05%
Health Care & Social Assistance	21,300	10.53%
Retail Trade	28,772	14.23%
Personal Services	7,189	3.55%
Social Service Organizations	2,870	1.42%
Other	2,668	1.32%
GOVERNMENT & GOV'T. ENTERPRISES	8,882	4.39%
Federal Government	2,917	1.44%
State & Local Government	5,966	2.95%
TOTAL EMPLOYMENT	202,231	100.00%

Source: Minnesota IMPLAN Group, Inc. (2002)

Unemployment Trends

The unemployment rate is considered a *lagging* economic indicator because it lags behind the dominant economic trend. Unlike the stock market, the labor market does not rebound in anticipation of an economic recovery. Rather, it rebounds two to three quarters *after* the economy has reached some degree of stability. Trends in the unemployment rate are a direct reflection of employer confidence. If the economy is in recession, employers are likely to take a “wait and see” approach before making a significant investment in labor. As indicated in, Figure 10, York County’s unemployment rate was 4.2 percent as recently as March 2006. In comparison, the unemployment rates for Pennsylvania and the United States were 5.0 percent and 4.8 percent, respectively.

Figure 10
Unemployment Trends: 1990-March 2006



For the last 16 years on record, York County’s unemployment rate has been consistently lower than State and National averages. This trend is indicative of a tight labor market, which places upward pressure on wages. At the national level, there are indications that employers are feeling more optimistic about the future. A U.S. Conference Board survey of the nations’ top 100 business leaders indicated that more CEOs are optimistic about the economy and their own industry. Absent any local measures of business confidence, it is difficult to predict how York County will fare in the coming months. Given the County’s heavy reliance upon value-added and routine manufacturing, sectors that have lost competitive advantage over the years, it will be important to provide a platform for launching new opportunities. At the regional level, export potential abounds in the growing field of producer services. Producer services, namely Professional, Scientific, & Technical Services, Finance & Insurance, and Business, Legal, & Engineering all exhibit strong location quotient at the regional level. Locally, only and Business, Legal, & Engineering has a strong export orientation. This leaves the door open for import substitution i.e. future expansion in this industry cluster.

Market Potential of the Northwest Triangle Initiative

As previously mentioned, The York area was recently named in the top 100 “smart places to live” in the nation by Kiplinger’s Personal Finance Magazine, with rankings based on things such as affordability, housing prices, job opportunities, and crime rates. In the same ranking, the Lancaster area ranked #37 in the country, and the Harrisburg area ranked #12. The ranking of Harrisburg and Lancaster in the top 50 is not likely by accident, but as a result of strategic partnerships, planning and implementation in each respective city.

The ranking of the York area in the top 100 is a great accomplishment, but we believe opportunities abound for the York area to climb in ratings as well. Its location along the I-83 corridor... its rich heritage and historic ambiance... the diversity of the local residents... the transportation system... the quality of the workforce... all provide the ingredients for successful revitalization of the York area. The location of York in the “path” of growth heading north from the Washington D.C./Northern Virginia area presents additional opportunities for economic growth. The partnerships and planning efforts that are currently underway represent the beginnings of transformation, and strategically positioned, the Northwest Triangle can become the hub of development as a “gateway” linking downtown York and the new recreation complex, as well as a catalyst for future development along the Codorus corridor.

The Retail Market

To measure the depth of the market for retail development on the NWT Site, we assessed indicators of the current demand for retail, as well as the current supply of retail within the market area. As discussed on page 9 of this report, the primary retail market area is considered to be the area within a 3-minute drive-time of the NWT Site. The demand for retail is measured by the current retail spending by residents in the area, and the supply is measured by the estimated retail sales by existing retail establishments.

Annual Household Spending

The spending potential in the area is measured by comparing local spending for each retail category to national spending presented as an index of 100. Therefore, a potential spending index score of over 100 represents a spending potential greater than the national average. As the following table indicates, residents in within a 3-minute drive-time of the NWT Site have significantly less spending potential than the national average. Based solely on spending patterns, the greatest potential appears to be in apparel & services and in restaurants.



**Table 11
Consumer Spending in Selected Retail Sectors
3-Minute Drive-Time**

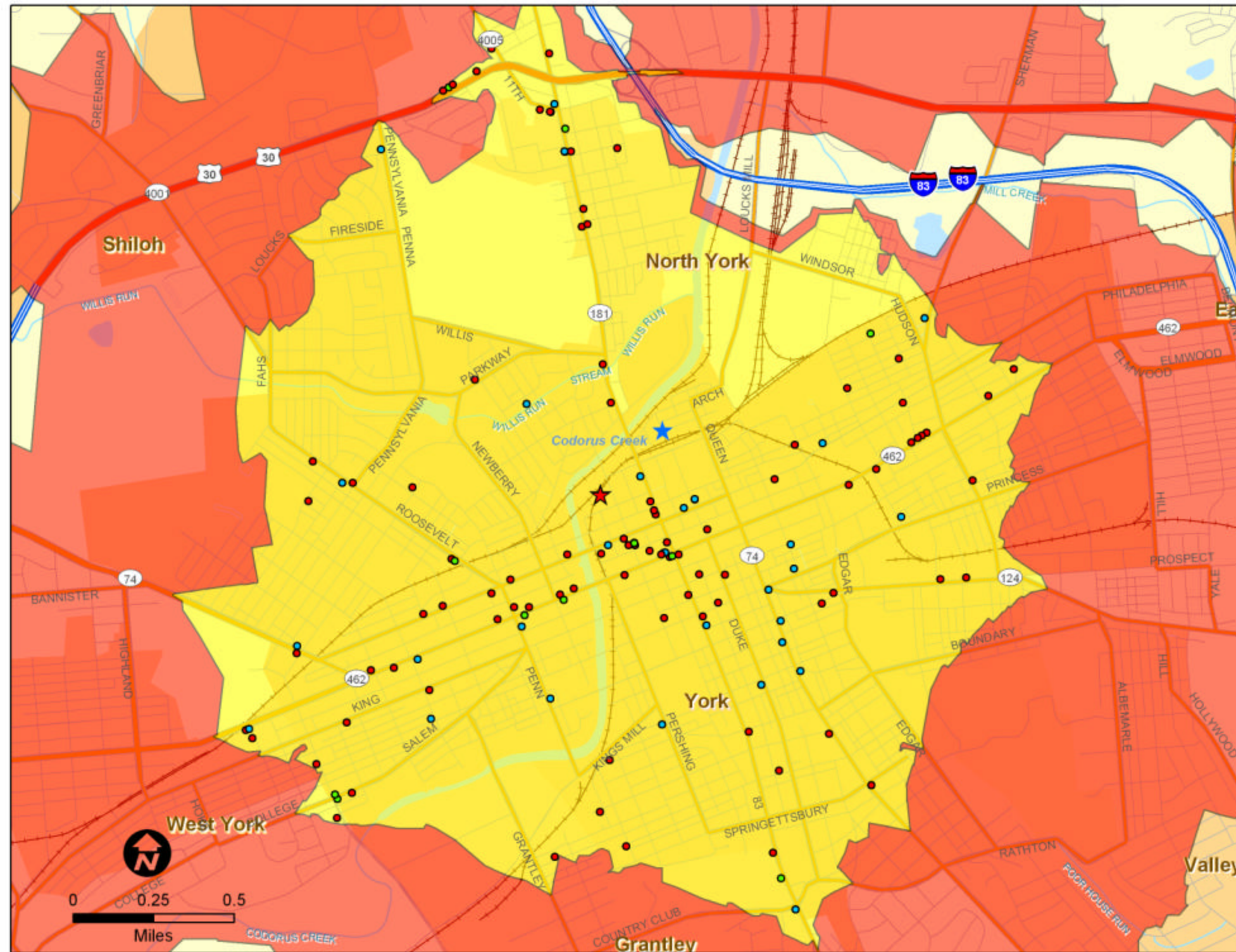
	Spending Potential Index	Average Amt. Spent per Household	Total Expenditures
Apparel & Services	60	\$1,667	\$25,472,020
Computers	52	\$159	\$2,436,103
Entertainment & Recreation Fees & Admissions	58	\$342	\$5,221,465
TV/Video/Sound Equipment	62	\$615	\$9,397,940
Pets	54	\$180	\$2,747,076
Toys & Games	56	\$122	\$1,857,987
Sports/Recreation/Exercise Equipment	51	\$111	\$1,698,082
Photo Equipment & Supplies	60	\$84	\$1,274,210
Reading	55	\$130	\$1,982,210
Food at Home	60	\$2,806	\$42,890,012
Food Away From Home	61	\$1,884	\$28,791,720
Alcoholic Beverages	66	\$320	\$4,889,621
Nonalcoholic Beverages at Home	59	\$233	\$3,563,181
Nonprescription Drugs	55	\$58	\$882,687
Prescription Drugs	61	\$291	\$4,454,529
Eyeglasses & Contact Lenses	54	\$47	\$719,752
Household Furnishings & Equipment	54	\$697	\$10,655,989
Housekeeping Supplies	58	\$385	\$5,887,643
Personal Care Products	60	\$238	\$4,830,027
School Books & Supplies	72	\$79	\$1,204,909
Smoking Products	65	\$316	\$4,830,027
Total/Average	59	\$10,764	\$165,687,190

Source: ESRI BIS

Estimated Current Retail Sales

Within the 3-minute drive-time of the Site, there are an estimated 276 retail establishments in sectors that related to the selected spending sectors in Table 11, with estimated annual sales of around \$274.7 million.

Map 3



Northwest Triangle Initiative Existing Retail Establishments

- Legend**
- ★ Northwest Triangle Site
 - ★ Future York Outdoor Recreation Complex
 - Primary Market Area
 - Secondary Market Area
 - Limited Access Highway
 - Primary Highway
 - Secondary Highway
 - Local Roads
 - Railroads

- Legend**
- Food Establishments
SIC Codes**
- Specialty Foods
 - Restaurant/Club
 - Grocery/Convenience Stores



**Table 12
Estimated Current Retail Sales**

Type	Number of Establishments	Estimated Sales Volume
Liquor	2	\$3,390,000
Clothing	12	\$4,640,000
Shoes	3	\$2,304,000
Specialty Clothing	1	\$136,000
Optical/Eyewear	3	\$1,725,000
Grocery	18	\$37,310,000
Ice Cream/Candy	4	\$960,000
Specialty Foods	22	\$10,731,000
Department Stores	1	\$16,200,000
General Merchandise	7	\$69,260,000
Home Improvement	6	\$5,837,000
Household, Furniture, Etc.	12	\$11,912,000
Antiques/Collectibles	10	\$1,769,000
Books/Gifts	3	\$1,814,000
Electronics/Wireless/Music	7	\$4,549,000
Florist	3	\$1,496,000
Hobby	13	\$4,178,000
Jewelry	5	\$4,056,000
Misc. Specialty Retail	4	\$938,000
Used Clothing/Furniture	6	\$2,904,000
Pets	2	\$4,288,000
Pharmacy	7	\$23,094,000
Fast Food	7	\$7,160,000
Coffee Shop	2	\$480,000
Deli	5	\$800,000
Pizza	15	\$5,000,000
Restaurant	45	\$22,080,000
Subs	5	\$1,360,000
Taverns/Clubs	25	\$8,410,000
Sporting Goods	5	\$3,552,000
News/Tobacco	5	\$1,833,000
Convenience Stores	11	\$10,556,000
Total	276	\$274,722,000

Source: ESRI BIS



Retail Market Potential

Comparing estimated annual spending by local residents of \$165.7 million to the estimated retail sales of \$274.7 million, there does not appear to be a current **demand** for additional retail from local residents. However, when the baseball stadium at the Proposed YORC site becomes a reality, and residential units are developed at the site that target young professionals and active adults, we believe there is an **opportunity** to create a market for restaurant/entertainment venues at the site.

It has been estimated that approximately 210,000 people will attend baseball games at the YORC stadium annually. If other venues during the course of the year attract a similar number of people annually, and if 25% of attendees to games and other events spent \$15 in eating and drinking establishments near the stadium, the area could support around 15,000 square feet of additional restaurant space. Restaurants could be further supported by the new daytime population associated with potential office development at the NWT Site.

Consideration of an entertainment venue, such as a small independent movie theater could add to the attractiveness of the area and provide additional foot traffic to help support restaurant development as well. There are currently 31 movie screens in York County. Industry standards suggest that it takes a population of between 5,000 and 10,000 to support one movie screen. Conservatively estimating 10,000 population per screen, the County could currently support up to 40 screens.

The Residential Market

Based on population projections and average household size, a total of 6,351 housing units will be required between 2005 and 2010 to support the population growth within a 25-minute drive of the NWT Site. Since the residential development at the Site will likely target young professionals and empty nesters, we looked at the expected change in households between the ages of 15 and 35, and between the ages of 50 and 64 as an indication of the potential market. Following is a summary of the expected change:

Table 13
Expected Change in Target Households
2005 - 2010

Householder Age	Expected Change In Households
15-30	613
30-35	(1,000)
50 – 64	5,667



As presented in Table 7, between 1995 and 2000, only around 37 housing units per year were absorbed in the City of York, which is not indicative of a significant demand. With an expected net decrease in households between the ages of 15 and 35, there does not appear to be **demand** for housing in this target age group. However, the **opportunity** exists to provide a housing option that could potentially capture the loss of some of the young households who are currently projected to leave the area. In addition, there is an expected increase of over 5,600 empty nester households within a 25-minute drive of the Site. Again, a housing option and amenities that would appeal to this age group could present an **opportunity** to capture some of the growth in this age group to downtown housing.

The Office Market

Over the past five years, York County has experienced an increase of 1,573 employees in industry sectors that are compatible with the office component proposed at the NWT Site. There are currently approximately 387,368 square feet of office space available for lease in the York area with approximately 93,733 square feet in the \$15-\$20/s.f. range and 98,040 in the \$12-\$15/s.f. range (see Appendix A).

Between 2001 and 2005, York County experienced an increase of approximately 1,573 employees in industry sectors that are compatible with the type of office space proposed for the NWT development. If this trend continues, an additional 524,000 square feet of office space will be needed to house new workers in the next five years. With a proposed 137,650 square feet of commercial space proposed at the NWT site, the development would need to capture around 26 percent of those jobs to support a development of this size.

The proposed NWT development will provide a mix of uses in a setting that is unique to the downtown area and could be attractive to employers looking to locate or expand in the area and potentially employ some of the approximately 30,000 York County residents who are currently leaving the County to work.



APPENDIX A



Appendix A - Current York Area Office Space for Lease					
Address	Type	Total SF	\$/SF	Type	Use
517 Carlisle Avenue	Area 1 - Lower Level; Immediate	1,400	\$4.25	Office	Office Building
304-308 East Market Street	304 - 2nd floor; Immediate	842	\$5.20	Office	Office Building
304-308 East Market Street	308 - 2nd floor; Immediate	780	\$5.23	Office	Office Building
304-308 East Market Street	304 - 3rd floor; Immediate	508	\$5.32	Office	Office Building
517 Carlisle Avenue	Area 2 - Lower Level; Immediate	1,600	\$5.50	Office	Office Building
257 E. Market St.	2nd Floor; Immediate	1,800	\$6.00	Office	Office Building
29 S. Queen St.	2nd & 3rd Floors; Immediate	2,120	\$6.00	Office	Office Building
116-118 E. Market St.	First Floor; Immediate	7,488	\$6.00	Office	Office Building
116-118 E. Market St.	Second Floor; Immediate	7,488	\$6.00	Office	Office Building
116-118 E. Market St.	Third Floor; Immediate	7,488	\$6.00	Office	Office Building
2331 E. Market St.	Unit E - 2nd floor; Immediate	1,000	\$6.00	Office	Office Building
1769 Whiteford Rd.	2nd floor; Immediate	1,664	\$6.50	Office	Office Building
264 W. Market St.	1st & 2nd floors; Immediate	2,024	\$6.50	Office	Office Building
29 S. Queen St.	Bldg.; Immediate	3,552	\$6.81	Office	Office Building
1215 E. Market St.	Avail. - 2nd floor; Immediate	1,512	\$7.50	Office	Office Building
160 Roosevelt Avenue	Suite 201; Immediate	2,181	\$7.50	Office	Office Building
13-15 W. Market St.	Third Floor; Immediate	2,200	\$7.50	Office	Office Building
150 Roosevelt Avenue	#300; Immediate	4,100	\$7.50	Office	Office Building
18 S. George St.	#501; Immediate	7,310	\$7.50	Office	Office Building



Appendix A - Current York Area Office Space for Lease

Address	Type	Total SF	\$/SF	Type	Use
18 S. George St.	#701; Immediate	4,423	\$7.50	Office	Office Building
4075 E. Market St.	Office; Immediate	3,852	\$8.00	Office	Office Building
4075 E. Market St.	Office; Immediate	3,852	\$8.00	Office	Office Building
Manufacturer's Association	B01; Immediate	1,215	\$8.00	Office	Office Building
11 East Market Street	Suite 1B; Immediate	610	\$8.00	Office	Office Building
11 East Market Street	Suite 1D; Immediate	370	\$8.00	Office	Office Building
11 East Market Street	Suite 2B; Immediate	150	\$8.00	Office	Office Building
11 East Market Street	Suite 2C; Immediate	1,445	\$8.00	Office	Office Building
11 East Market Street	Suite 2D; Immediate	675	\$8.00	Office	Office Building
11 East Market Street	Suite 2E; Immediate	600	\$8.00	Office	Office Building
11 East Market Street	Suite 2F; Immediate	530	\$8.00	Office	Office Building
29 S. Queen St.	1st floor; Immediate	1,432	\$8.00	Office	Office Building
37 West Market Street	Unit 1; Immediate	216	\$8.33	Office	Office Building
37 West Market Street	Unit 2; Immediate	216	\$8.33	Office	Office Building
37 West Market Street	Unit 3; Immediate	216	\$8.33	Office	Office Building
37 West Market Street	Unit 4; Immediate	216	\$8.33	Office	Office Building
Loucks Plaza	Unit #5; Immediate	1,500	\$9.00	Office	Office Building
1 West Market Street	6B; Immediate	750	\$9.00	Office	Office Building
1 W. Market St.	2nd Floor - 3B; Immediate	3,684	\$9.00	Office	Office Building
1 W. Market St.	2nd Floor - 4B; Immediate	2,052	\$9.00	Office	Office Building
1 W. Market St.	2nd Floor - 5B; Immediate	400	\$9.00	Office	Office Building
1 W. Market St.	2nd Floor - 6B; Immediate	750	\$9.00	Office	Office Building
1 W. Market St.	3rd Floor - C1;	2,088	\$9.00	Office	Office Building



Appendix A - Current York Area Office Space for Lease					
Address	Type	Total SF	\$/SF	Type	Use
	Immediate				
267-269 E. Market St.	Right Side; Immediate	1,500	\$9.50	Office	Office Building
267-269 E. Market St.	Left Side; Immediate	1,500	\$9.50	Office	Office Building
707 Loucks Rd.	Available; 8/1/2006	15,120	\$9.50	Office	Office Building
18 S. George St.	#605; Immediate	2,636	\$9.50	Office	Office Building
2130 Pennsylvania Ave.	Bldg.; Immediate	5,265	\$9.50	Office	Office-R&D
135 E. Market St.	1st Floor rear; Immediate	500	\$9.60	Office	Office Building
Manufacturer's Association	302; Immediate	550	\$9.99	Office	Office Building
Manufacturer's Association	303; Immediate	750	\$10.00	Office	Office Building
Manufacturer's Association	302 & 303; Immediate	1,300	\$10.00	Office	Office Building
11 East Market Street	Suite 2A; Immediate	1,104	\$10.00	Office	Office Building
2 West Market Street	Second Floor; Immediate	3,570	\$10.00	Office	Office Building
912 S. George St.	First floor; Immediate	6,609	\$10.00	Office	Office Building
912 S. George St.	Lower level; Immediate	3,258	\$10.00	Office	Office Building
1 East Market St.	Unit 1B; Immediate	2,300	\$10.00	Office	Office Building
1 East Market St.	Unit 1C; Immediate	2,002	\$10.00	Office	Office Building
1 East Market St.	Unit 1D; Immediate	2,162	\$10.00	Office	Office Building
18 S. George St.	#425A; Immediate	1,275	\$10.00	Office	Office Building
1 W. Market St.	1st Floor - 9A; Immediate	1,000	\$10.00	Office	Office Building
18 S. George St.	#220A; Immediate	686	\$10.25	Office	Office Building
York Gas Building	130; Immediate	664	\$10.50	Office	Office Building
York Gas Building	115; Immediate	352	\$10.50	Office	Office Building
York Gas Building	120; Immediate	230	\$10.50	Office	Office Building
149-155 W. Market St.	Area 2 - 2nd fl frnt; Immediate	3,900	\$10.50	Office	Office Building



Appendix A - Current York Area Office Space for Lease					
Address	Type	Total SF	\$/SF	Type	Use
149-155 W. Market St.	Area 2-2nd fl rear; Immediate	7,800	\$10.50	Office	Office Building
18 S. George St.	#620; Immediate	530	\$10.51	Office	Office Building
18 S. George St.	#615; Immediate	627	\$10.53	Office	Office Building
1805 Loucks Road	Office Suite; Immediate	2,286	\$11.00	Office	Office Building
1 W. Market St.	4th Floor; Immediate	17,059	\$11.00	Office	Office Building
8 West King Street	8 W. King; Immediate	1,000	\$11.16	Office	Office Building
195 Leader Heights Rd.	Bldg.; 10/31/2006	2,054	\$11.50	Office	Office Building
35 E. Philadelphia St.	Available; Immediate	930	\$11.87	Office	Office Building
701 Albright Ave	Area 1-2nd floor; Immediate	115	\$12.00	Office	Office Building
701 Albright Ave	Area 2-2nd floor; Immediate	178	\$12.00	Office	Office Building
701 Albright Ave	Area 3-2nd floor; Immediate	194	\$12.00	Office	Office Building
701 Albright Ave	Area 4-1st floor; Immediate	678	\$12.00	Office	Office Building
135 N. George St.	1st floor; Immediate	1,485	\$12.00	Office	Office Building
2453 Kingston Court	101; Immediate	950	\$12.00	Office	Office Building
2453 Kingston Court	102; Immediate	950	\$12.00	Office	Office Building
22 N. George St.	Available; Immediate	6,204	\$12.00	Office	Office Building
101-103 S. George St. - 2nd floor space	2nd Floor; Immediate	7,146	\$12.00	Office	Office Building
2 West Market Street	First Floor; Immediate	4,850	\$12.00	Retail	Retail (Other)
1 East Market St.	Unit 3A; Immediate	3,513	\$12.00	Office	Office Building
1601 S. Queen St.	Bldg.; Immediate	1,922	\$12.50	Office	Medical Office
1681 Kenneth Road	Bldg. A; Immediate	1,430	\$12.50	Office	Office Building
1 East Market St.	Unit 2A; Immediate	2,588	\$13.00	Office	Office Building



Appendix A - Current York Area Office Space for Lease					
Address	Type	Total SF	\$/SF	Type	Use
1 East Market St.	Unit 2D; Immediate	1,650	\$13.00	Office	Office Building
Manufacturer's Association	205; Immediate	680	\$13.24	Office	Office Building
1701 W. Market St.	Avail.; 6/1/2006	450	\$13.33	Office	Office Building
Sixth Avenue Professional Center	1 G; Immediate	2,999	\$13.50	Office	Office Building
2870 Eastern Blvd.	First Floor; Immediate	6,612	\$13.50	Office	Office Building
2870 Eastern Blvd.	Second Floor; Immediate	6,612	\$13.50	Office	Office Building
2870 Eastern Blvd.	Lower Level; Immediate	6,612	\$13.50	Office	Office Building
1600 Sixth Avenue - Office Condominiums	Suite 105; Immediate	4,309	\$13.50	Office	Medical Office
1600 Sixth Avenue - Office Condominiums	Suite 108; Immediate	3,570	\$13.50	Office	Medical Office
1600 Sixth Avenue - Office Condominiums	Suite 109; Immediate	3,343	\$13.50	Office	Medical Office
1600 Sixth Avenue - Office Condominiums	Suite 111; Immediate	1,525	\$13.50	Office	Medical Office
1600 Sixth Avenue - Office Condominiums	Suite 116; Immediate	3,683	\$13.50	Office	Medical Office
1600 Sixth Avenue - Office Condominiums	Suite 117; Immediate	3,664	\$13.50	Office	Medical Office
1600 Sixth Avenue - Office Condominiums	Suite 118; Immediate	4,086	\$13.50	Office	Medical Office
1600 Sixth Avenue - Office Condominiums	Suite 119; Immediate	3,909	\$13.50	Office	Medical Office
1600 Sixth Avenue - Office Condominiums	Suite 116, 117 & 118; Immediate	11,433	\$13.50	Office	Medical Office
1305 East Market Street	Area 1; Immediate	700	\$13.71	Office	Office Building
1420 Sixth Ave.	Area 2; Immediate	7,339	\$14.00	Office	Office Building
1420 Sixth Ave.	Area 3; Immediate	8,388	\$14.00	Office	Office Building
36 N. Beaver St.	Available; Immediate	1,050	\$14.29	Office	Office Building
2315 Susquehanna Trail	Unit #2; 3/31/2007	1,440	\$15.00	Office	Office Building



Appendix A - Current York Area Office Space for Lease					
Address	Type	Total SF	\$/SF	Type	Use
North					
2315 Susquehanna Trail North	Unit #3; 3/31/2007	1,440	\$15.00	Office	Office Building
2315 Susquehanna Trail North	Unit #4; 3/31/2007	1,440	\$15.00	Office	Office Building
2315 Susquehanna Trail North	Unit #5; 3/31/2007	1,440	\$15.00	Office	Office Building
2315 Susquehanna Trail North	Unit #6; 3/31/2007	1,440	\$15.00	Office	Office Building
18 S. George St.	#228; Immediate	343	\$15.74	Office	Office Building
2251 Eastern Blvd	Area 1-First floor; 10/1/2006	7,400	\$16.00	Office	Office Building
2251 Eastern Blvd	Area 2 - First floor; 10/1/2006	7,400	\$16.00	Office	Office Building
2251 Eastern Blvd	Area 3 - Second flr; 10/1/2006	14,800	\$16.00	Office	Office Building
221 West Philadelphia Street - East	York, PA	2,206	\$16.50	Office	Office Building
221 West Philadelphia Street - East	York, PA	8,037	\$16.50	Office	Office Building
221 West Philadelphia Street - East	York, PA	4,437	\$16.50	Office	Office Building
221 West Philadelphia Street - East	York, PA	3,600	\$16.50	Office	Office Building
96 S. George St. - Suite 220	Suite 220; Immediate	1,782	\$16.75	Office	Office Building
221 W. Philadelphia St. - West Bldg.	46; Immediate	1,759	\$17.00	Office	Office Building
18 S. George St.	#606; Immediate	185	\$19.46	Office	Office Building
18 S. George St.	#419; Immediate	180	\$20.00	Office	Office Building
18 S. George St.	#420; Immediate	180	\$20.00	Office	Office Building
18 S. George St.	#215; Immediate	160	\$22.50	Office	Office Building
241 N. George St.	First Floor - Main; Immediate	9,488	Negotiable	Retail	Retail (Other)
241 N. George St.	First Floor - side;	5,600	Negotiable	Retail	Retail (Other)



Appendix A - Current York Area Office Space for Lease					
Address	Type	Total SF	\$/SF	Type	Use
	Immediate				
241 N. George St.	Second Floor; Immediate	9,488	Negotiable	Office	Office Building
241 N. George St.	Third Floor; Immediate	9,488	Negotiable	Office	Office Building

Total S.F. 387,368

\$15-\$23/s.f. 93,733

\$12-\$14/s.f. 98,040

Source: Rock Commercial Real Estate property listings (www.rockrealestate.net)

