Appendix A: Community Profile

Demographic Overview

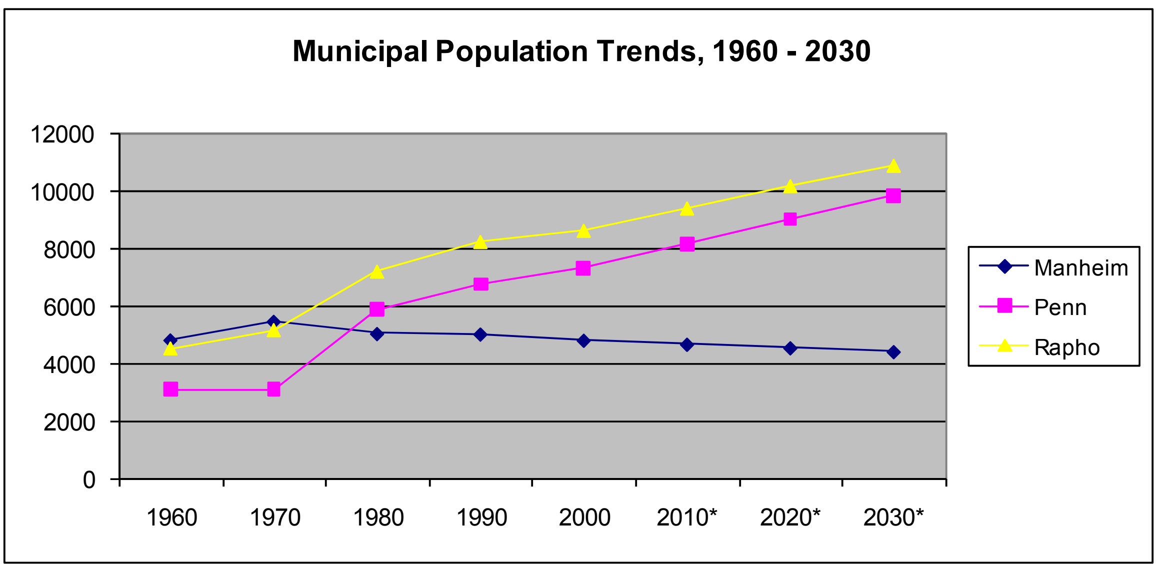
An understanding of the size and nature of the population of an area is essential to making decisions about land use, housing and the provision of services for residents. This section will present an overview of the characteristics of the current population, population and housing projections for the Region as well as a description of the housing in each municipality. Unless otherwise stated all data comes from the 2000 US Census.

Demographic Summary

The Manheim Central Region is characterized by a somewhat older and more affluent population with a modest minority presence and relatively lower education levels. The area saw substantial growth in the 1970s and 1980s, and it appears that the first decade of the 21st century will be one of growth as well. The influx of new residents is creating a more diverse population, though not a younger one.

Population Trends

The Region has seen marked growth in the past fifty years, and continued moderate growth is projected through 2030, which is the Lancaster County planning horizon. For much of the first part of the twentieth century the Region could be characterized as a rural, agricultural area, surrounding the small, urban municipality of Manheim Borough. However, as the graph below and **Table A1: Population Trends** indicate this description began to change as the last century drew to a close.



The population of Manheim Borough declined slightly, starting in the 1980s. The two townships, however, experienced sharp growth between 1970 and 1980, and Rapho Township continued this growth through the 1980s.

The projections shown below are from the Lancaster County Planning Commission. Based on these projections, the population of the two townships is likely to continue to increase at a steady rate while that in the Borough is anticipated to modestly decline.

Table A1: Population Trends

	1960	1970	1980	1990	2000	2010*	2020*	2030*
Manheim	4,794	5,434	5,015	4,995	4,784	4,646	4,521	4,391
Penn	3,072	3,081	5,865	6,757	7,312	8,151	9,017	9,849
Rapho	4,484	5,121	7,157	8,188	8,578	9,355	10,132	10,844
Region	12,350	13,636	18,037	19,940	20,674	22,152	23,670	25,084

*Lancaster County Planning Commission

As Table A1 shows, the population of the Region is expected to double over the period 1960 to 2030. Penn Township, starting from a smaller base, will more than triple in population over the period, experiencing an increase of 6,777 persons. Rapho Township will increase by nearly 250 percent, growing by 6,360 in these projections. As noted, Penn Township's greatest gain came between 1970 and 1980 when almost 3,000 people moved to the Township. The rate of growth slowed sharply after that.

Recently released figures from the Pennsylvania State Data Center indicate that Lancaster County grew by some 28,000 persons between 2000 and 2007, a 5.9 percent increase. This was the fourth largest increase in the state, with Lancaster trailing only Chester, Berks and York Counties.

Figures from the Internal Revenue Service (based upon tax returns filed) indicate that approximately 7,200 people moved into Lancaster County from some other location within Pennsylvania, and about one-half of these people came from Chester, York and Berks Counties. Indeed, figures from a study that is part of the County's most recent HUD-mandated Consolidated Plan indicate that much of the Region's growth can be attributed to households moving from the City of Lancaster and other nearby areas to the Region.

Despite this growth, figures on the length of time people have resided in their homes reveal that the Region has a stable population base. **Table A2: Time in Residence** below indicates that almost two-thirds of households resided in the same structure in 1995 as they did in 2000. This compares to only 54 percent for the nation and 60 percent for the County.

Table A2: Length of Residence (1995 to 2000)

Residence	Manheim	Penn	Rapho	**Average of Combined**	Lancaster	Pennsylvania	Nation
Same House	62.4%	64.2%	70%	65.5%	60.1%	63.5%	54.1%
Moved, Same County	29.2%	27.9%	24.9%	27.3%	27.2%	21.7%	24.9%
Moved, Same State	2.2%	4.7%	2.9%	3.2%	6.4%	7.6%	9.7%
Moved, Different State	5.3%	1.4%	2%	2.9%	4.9%	5.8%	8.4%
Moved from Elsewhere	0.9%	1.8%	0.1%	1%	1.3%	1.4%	2.9%

Households

In each of the municipalities approximately 98 percent of the population lives in households, with the remaining two percent in some type of institutional living situation. The percentage of households that are families exceeds the US figure of 68 percent in all three municipalities. The percentage of householders living alone is below the US figure (25.8 percent) in both Penn and Rapho Townships, and is 26.6 percent in Manheim.

The average household size of the three municipalities in 2000 was 2.66 persons. The average household size in the two Townships is slightly higher than the figures for the US (2.59) and for the Commonwealth (2.48) due to the presence of younger families. Manheim's average household size is 2.4, the lowest of the three. ESRI, a private firm that provides demographic and economic data, projects that household size for the three communities will decline to 2.54 persons per household in 2013, reflecting the aging of the population, which is discussed below.

Age Characteristics

Table A3: Age Characteristics shows the percentage of the population of the three municipalities and the Region by age cohort and compares these figures to County, state and national percentages. There are some noticeable differences among the municipalities and in comparison to County, Commonwealth and nation.

Table A3: Age Characteristics

Age Cohort	Manheim	Penn	Rapho	Average of Combined	Lancaster	Pennsylvania	Nation
<5	5.9%	6.5%	6.7%	**6.3%**	6.9%	5.9%	6.8%
5-9	6.7%	7.4%	7.7%	**7.3%**	7.6%	6.7%	7.3%
10-14	7.8%	7.8%	8.2%	**7.9%**	7.7%	7%	7.3%
15-19	6.6%	7.1%	6.9%	**6.9%**	7.3%	6.9%	7.2%
20-24	5.6%	4.9%	5.1%	**5.2%**	6.2%	6.1%	6.7%
25-34	13.5%	11.6%	10.5%	**11.9%**	12.6%	12.7%	14.2%
35-44	16.8%	15.4%	17.5%	**16.6%**	15.7%	15.9%	16%
45-54	11.9%	15.1%	15.6%	**14.2%**	13.2%	13.9%	13.4%
55-59	5%	5.5%	5.4%	**5.3%**	4.8%	5%	4.8%
60-64	4%	4.1%	4.6%	**4.2%**	3.9%	4.2%	3.8%
65-74	8.9%	7%	7.3%	**7.7%**	6.9%	7.9%	6.5%
75-84	6.2%	4.9%	3.5%	**4.9%**	5.2%	5.8%	4.4%
85+	1.3%	2.7%	1%	**1.7%**	1.9%	1.9%	1.5%
%18+	75.4%	73.9%	72.9%	**74.1%**	73.4%	76.2%	74.3%
%21+	72.3%	70.1%	69.3%	**70.6%**	69%	72%	70%
%65+	16.4%	14.6%	11.7%	**14.2%**	14%	15.6%	12.4%
Median Age	37.6	38.4	37.9	**38.0**	36.1	38.0	35.3

Though the average percentage of school-age persons is close to national figures, the percentage of young adults (ages 15 to 35) lags the national figures and even that of the state, especially in the 20-24 age cohort. From that cohort forward, the percentages are above the national figures. The result is that the Region has a median age higher than that of the nation, on par with that of the Commonwealth and above the County figure of 36.1 years. The percentage of seniors (65+) in the Region is slightly higher than that of the County, but still below the state figure. Interestingly, the Borough has the lowest median age, in part because of the relative strength of the age 20 – 44 cohorts and the small size of its senior cohort. Penn Township has a high percentage of the very elderly (85+) because of the presence of several retirement and assisted living facilities.

ESRI estimates and projections for 2008 and 2013 respectively, indicate that the numbers of youth will decline in all three municipalities over the period, while the percentages of seniors will increase overall. Both Penn and Rapho Townships are expected to see a noticeable increase in the age cohort of 60 to 64, as current residents "age in place." The percentage of very elderly in Penn Township is anticipated to remain level, though that of Rapho will grow significantly. Manheim is expected to see the increase in the 60-64 age group as well as an increase in the very elderly. However, the Borough is projected to see a decrease in the percentage of persons aged between 64 and 84.

Overall, the population is increasing in size, but is becoming an increasingly older population. The number of young adults will remain small relative to the entire population according to these projections. Manheim will have the youngest median age (39.0) by 2013, and Rapho is expected to have the highest median age, despite the fact that an estimated 25 percent of the population will be under the age of 18.

Racial/ethnic Characteristics

The racial composition of the Region according to the 2000 Census is shown in **Table A4: Racial Characteristics**. As can be seen, the population is predominantly White with small percentages of Blacks, Asians and Other. The Hispanic population is also very small, relative to the US and Lancaster County figures.

Table A4: Racial Characteristics

Race	Manheim	Penn	Rapho	**Average of Combined**	Lancaster	Pennsylvania	Nation
One Race	98.7%	99.5%	99.4%	**99.2%**	98.7%	98.8%	97.6%
White	96.4%	97.5%	97.7%	**97.2%**	91.5%	85.4%	75.1%
African-American	0.6%	0.8%	0.3%	**0.6%**	2.8%	10%	12.3%
Native American	0.1%	0.2%	0.1%	**0.1%**	0.1%	0.1%	0.9%
Asian	1%	0.7%	0.8%	**0.8%**	1.4%	1.8%	3.6%
Pacific Islander	-	0.1%	-	**0.1%**	-	-	0.1%
Other	0.6%	0.2%	0.5%	**0.4%**	2.9%	1.5%	5.5%
Two Races	1.3%	0.5%	0.6%	**0.8%**	1.3%	1.2%	2.4%
Hispanic (may be any race)	0.2%	0.9%	0.8%	**0.6%**	5.7%	3.2%	12.5%

However, the 2008 estimates from ESRI show increases in the percentages of Blacks, Asians and Hispanics. The latter group in particular has increased according to these figures, increasing by approximately 60 percent in Manheim and doubling in Rapho Township. The number of Hispanics is small, thus making the percentage increase significant. Projections indicate that the Hispanic population in both Manheim and Penn Township will double between 2000 and 2013, while it will almost triple in Rapho. Though the Region's population will likely not become as diverse as that of the nation in the near future, the area is undergoing racial and ethnic change as the population continues to grow.

Educational Attainment

Educational Attainment figures are important to understanding many aspects of an area, especially assessing the types of jobs and industries that an area can support. The educational attainment figures for the three municipalities and the Region are shown in **Table A5: Educational Attainment**.

Table A5: Educational Attainment

Attainment	Manheim	Penn	Rapho	**Average of Combined**	Lancaster	Pennsylvania	Nation
<9th Grade	7.4	9.5	8.4	**8.4**	9.3	5.5	7.5
9th - 12th, no diploma	16.0	14.6	14.5	**15.0**	13.4	12.6	12.1
HS Graduate	45.8	46.1	48.1	**46.7**	38.8	38.1	28.6
Some college, no degree	10.7	10.3	10.8	**10.6**	13.5	15.5	21.0
Associate degree	3.7	4.4	4.3	**4.1**	4.5	5.9	6.3
Bachelor's degree	11.2	11.5	9.2	**10.6**	13.8	14.0	15.5
Graduate or professional degree	5.3	3.6	4.7	**4.5**	6.7	8.4	8.9
% HS or better	76.6	75.9	77.2	**76.6**	77.4	81.9	80.4
% Bachelor's degree or better	16.5	15.1	13.9	**15.2**	20.5	22.4	24.4

These figures are very revealing. They show a very high percentage of high school graduates relative to state and national figures, and a high percentage of persons with some high school, but no diploma. At the same time, the percentages of persons with a post-secondary education are well below the national and state figures. Thus, the overall attainment level is low relative to state and national figures.

The explanation for this may be attributed to several factors. In part, it is reflective of the "brain drain" that many Pennsylvania and rural communities face as young people leave the area for better jobs elsewhere in the country. In addition, some residents note that young people graduate from high school and go to work in agriculture, feeling that they do not need or want further education. Another factor may be that many of the Region's older residents did not want or need higher education. Finally, in the Region's Mennonite and Amish communities, there is not a perceived need for education past the basics.

However, the influx of new residents may be changing this pattern. The 2008 estimates (there are no projections for 2013) show modest increases in the percentages of persons with post-secondary education, especially among those with a Bachelor's degree or better. This would reflect the influx of new, working age residents from other parts of the state or nation.

Housing Analysis

Number and type of Housing Units

In 2000 Manheim Borough had 2,075 housing units of which 1,989 (95.9 percent) were occupied. The same year, Penn Township had 2,671 housing units, of which 2,606 (97.6 percent) were occupied, and Rapho Township contained 3,185 units with 3,075 (96.5 percent) were occupied. Both homeowner and renter vacancies in all three jurisdictions were low (approximately 1.1 percent for owners and 4.0 percent for rentals) indicating a "tight" housing market at that time. The owner to renter ratio in Manheim is close to the national figure, but the two Townships have much higher percentages of owner-occupied units and correspondingly fewer rental units. (See **Table A6: Housing Ownership**)

Table A6: Housing Ownership by Percent

Units	Manheim	Penn	Rapho	**Average of Combined**	Lancaster	Pennsylvania	Nation
Occupied Units	95.9%	97.6%	96.5%	**96.7%**	95.9%	91%	91%
Vacant	4.1%	2.4%	3.5%	**3.3%**	4.1%	9%	9%
Seasonal	0.2%	0.1%	0.4%	**0.2%**	0.4%	2.8%	3.1%
Owner-occupied	67.3%	77.1%	84.4%	**76.3%**	70.8%	71.3%	66.2%
Renter-occupied	32.7%	22.9%	15.6%	**23.7%**	29.2%	28.7%	33.8%

Table A7: Housing Units by Type shows the percentages of housing by types in the three municipalities, as of the 2000 Census. The average for the three municipalities is shown for each type of structure, but the difference between the Borough's urban nature and the rural/suburban nature of the Townships is clear; the Borough has a much greater percentage of multiple unit structures, as one would expect of an urbanized area. The prevalence of one-unit attached and two unit structures in Manheim reflects the historic architectural and building preferences in Lancaster County and Pennsylvania, as opposed to the use of the same structures nationwide.

Table A7: Housing Units by Type

Units in Structure	Manheim	Penn	Rapho	Average of Combined	Lancaster	Pennsylvania	Nation
1-unit, detached	54.8%	71.4%	74.7%	**67%**	56.1%	55.9%	60.3%
1-unit, attached	19.8%	6.7%	4%	**10.2%**	18.9%	17.9%	5.6%
2 units	9.9%	3.6%	3.3%	**5.6%**	4.4%	5.2%	4.3%
3 or 4 units	8.5%	4.3%	1.1%	**4.6%**	4.9%	4.6%	4.7%
5 to 9 units	3.7%	1.5%	0.2%	**1.8%**	4.8%	3.4%	4.7%
10 to 19 units	2.1%	1.5%	4.6%	**2.7%**	2.5%	2.5%	4%
20 + units	-	1.9%	-	**1.9%**	3.7%	5.4%	8.6%
Mobile Home	1.3%	8.9%	12.2%	**7.5%**	4.7%	4.9%	7.6%
Boat, RV, van	-	-	-	**-**	-	0.1%	0.2%

Growth and Projections

Projections from ESRI show the continued growth in the number of housing units, paralleling the population increase. The ESRI figures show the percentage of vacant units to maintain the 2000 levels. Though the percentage of owner-occupied units will remain well above 70 percent in Rapho, the percentage of owner-occupied units will decline to about 70 percent in Penn Township by 2013 and get to almost the national percentages in the Borough by that year. This means that a number of rental units will come to market over this period. **Table A8: Housing Unit Projections** shows these projections in terms of numbers of units.

Table A8: Housing Unit Projections

	Manheim		Penn		Rapho	
YEAR	**2008**	**2013**	**2008**	**2013**	**2008**	**2013**
Total Housing Units	2,119	2,164	3,326	3,612	3,851	4,159
Owner Units	1,357	1,347	2,448	2,555	3,070	3,253
Renter Units	675	727	798	956	625	727
Vacant	87	90	80	101	156	179

These figures show an increase of about fifty new rental units in Manheim and Penn, and 100 new rental units in Rapho.

Age of Units

Though much of the housing stock in the Townships was constructed in the 1970s and 1980s, even that stock is now approaching twenty years in age and the earliest of 1960s vintage stock in Penn Township is now approaching fifty years. In addition to the over 20 percent of pre-1939 housing in the two Townships, more than 50 percent of the Borough's housing stock is in this age group. The figures in **Table A9: Year Structure Built** imply that the three municipalities will need to consider expanding their housing rehabilitation and emergency repair programs, especially in light of the increasing age of the residents. Furthermore, the pre-1970s housing stock very likely has high concentrations of lead-based paint and programs to remediate this hazard will need to be continued and expanded.

Table A9: Year Structure Built (2000 Census)

Year/Period	Manheim	Penn	Rapho	**Average of Combined**	Lancaster	Pennsylvania	Nation
1990-2000	4.1%	17%	13.6%	**11.6%**	16.7%	10.5%	17%
1980-1989	2.3%	17.7%	21.6%	**13.9%**	15.8%	10.1%	15.8%
1970-1979	6.7%	23.8%	24.6%	**18.4%**	15.1%	13.5%	18.5%
1960-1969	9.8%	10.5%	8.5%	**9.6%**	10.5%	11.4%	13.7%
1940-1959	27.2%	9.2%	9.2%	**15.2%**	16.5%	24.3%	20%
Pre-1939	50%	21.7%	22.5%	**31.4%**	25.5%	30.3%	15%

Housing Values

One of the reasons for the continued growth pressure in the Manheim Central Region, in addition to the perceived high quality of life, is the relative affordability of housing. The table below demonstrates that housing values in the two Townships were only eight percent higher than national and Lancaster County figures, though they were significantly higher than the state median. Values in the Borough were higher than those of the state, but were still lower than those of the County. Fifty percent of homes were valued at between $100,000 and 150,000. Less than one percent of homes were valued at over $500,000, and none were priced over $1,000,000.

In 2000 there were 5,944 owner-occupied units in the three municipalities of which approximately 50 percent have a mortgage. Almost 27 percent of owner-occupied units had mortgage payments of between $1,000 and $1,500. Only 94 units had a mortgage payment of more than $2,000. The median mortgage payment was very close to state and national norms. Regional buyers were able to purchase a larger (median 6 rooms versus US median of 5.3 rooms), and likely newer, home for a payment in line with broader norms.

Table A10: Housing Value Comparison -- 2000

Value	Manheim	Penn	Rapho	Average of Combined	Lancaster	Pennsylvania	Nation
<$50,000	0.4%	0.9%	1.7%	**1%**	1.9%	15.1%	9.9%
$50,000-$99,999	46.5%	16.4%	17.8%	**26.9%**	29.1%	37.4%	30.4%
$100,000-$149,999	42%	59.4%	50.8%	**50.7%**	42.8%	24.3%	23.7%
$150,000-$199,999	9.3%	16.3%	17.2%	**14.3%**	15.8%	11.9%	14.6%
$200,000-$299,999	1.8%	4.3%	9.5%	**5.2%**	7.7%	7.4%	11.9%
$300,000-$499,999	-	2.2%	2.4%	**2.3%**	2.1%	2.9%	6.5%
$500,000-$999,999	-	0.6%	0.7%	**0.65%**	0.6%	0.8%	2.4%
>$1,000,000	-	0%	-	**0%**	-	0.2%	0.6%
Median Value	$103,000	$124,100	$128,000	**$118,367**	$119,300	$97,000	$119,600
Median Mortgage Payment	$996	$1,075	$1,058	**$1,043**	$1,054	$1,010	$1,086
Owner Cost as % of HH Income 30-34%	7.2	8.4	5.7	**7.1**	6.3	5.7	6.0
Owner Cost as % of HH Income 35% or Greater	14.5	12.2	9.5	**12.1**	12.6	15.1	15.8

Looking forward, the ESRI estimates and projections present very telling numbers. Home values increased by 60 percent in the period 2000 to 2008, a fact of which many residents and potential home buyers are well aware. The projected increases between 2008 and 2013, however, are much more modest, in the range of three percent, as **Table A11: Housing Value Projections** shows.

Table A11: Housing Value Projections

	Manheim			**Penn**			**Rapho**		
YEAR	**2000**	**2008 est.**	**2013 Proj.**	**2000**	**2008 est.**	**2013 Proj.**	**2000**	**2008 est.**	**2013 Proj.**
Median Value	$103,000	$164,109	$169,064	$124,100	$198,219	$203,491	$128,000	$206,909	$213,079
Increase		$61,109	$4,955		$74,119	$5,272		$78,909	$6,170
% Increase		59.3%	3.0%		59.7%	2.7%		61.6%	3.0%

These figures predate the collapse of the national housing bubble, and the value figures for 2013 may well be zero or even negative in light of recent events. However, it appears that the regional market was less impacted by the inflation of housing prices than many areas of the nation.

Affordability – Owner Market

As noted above, mortgage payments in 2000 were on par with state and national figures, and the percent of home owners who are "cost-burdened," defined as paying more than 30 percent of income for shelter, is relatively low. In 2000 Penn Township had the highest percentage of owners who were cost-burdened (8.4 percent), and the average for the Region was 7.1 percent, one percentage point higher than the national figure. Figures for households spending more than 35 percent of income for shelter in each of the municipalities were lower than the state and national percentages.

However, the picture has changed since the Census data was collected, in large measure because of the dramatic increase in housing prices over the past seven years. Housing prices have increased much faster than incomes, and affordability is an issue for residents seeking to purchase a home. Realtor.com indicates that the median asking price for a home in the Region has declined from $234,900 to $199,900. The estimated median household income is $59,737 per ESRI. Using the National association of Realtors Affordability Calculator, a household at that income could afford a home valued at $195,000 (monthly payments of $1,400). This gap is approximately $5,000, though that is based upon the household income at the median figure – many first-time buyers are at 80 percent of the median, creating a gap of approximately $40,400.

It should be noted that to some extent housing prices are influenced by the external nature of the market. That is, households coming from outside the Region, may well see housing prices in the Region as affordable relative to prices in their area. This inflation of pricing in new homes also impacts the pricing of existing homes for sale, thus creating a situation in which all housing prices rise. The collapse of the housing "bubble" and increased standards for loans will very likely result in the decline of housing prices, though it may not make them entirely affordable.

Affordability - Rental Market

The situation is different for renters in the Region. **Table A12: Rental Unit Statistics** shows the structure of rents in 2000. There were 1,597 rental units in the three municipalities. Despite the relative paucity of rental units across the Region, the median rent was $537, well below the national median. Well over one-half (59.2 percent) of the units rented for between $350 and $550. The next largest group (13.6 percent) rented for between $550 and $650. There were no rents over $900, and 5.6 percent of households paid no cash rent. The percentages of households that were cost-burdened were at or below national figures in all three municipalities.

Table A12: Rental Unit Statistics – 2000

Rent	Manheim	Penn	Rapho	**Average of Combined**	Lancaster	Pennsylvania	Nation
<$200	1.5%	0%	3.9%	**1.8%**	2.8%	6.3%	5.2%
$200-$299	4.6%	4.2%	5.2%	**4.7%**	3.7%	6.6%	5.2%
$300-$499	28.8%	28.5%	32.1%	**29.8%**	27%	28.9%	22%
$500-$749	51.2%	50.8%	46.6%	**49.5%**	44.2%	33.7%	33.7%
$750-$999	9.3%	9.4%	5.7%	**8.1%**	13.1%	12.4%	17.2%
$1,000-$1,499	-	1.2%	-	**1.2%**	3.9%	4.8%	8.7%
>$1,500	-	0%	-	**0%**	1.8%	1.5%	2.9%
No Cash Rent	4.5%	5.8%	6.5%	**5.6%**	3.6%	5.8%	5.2%
Median Rent	$560	$531	$521	**$537**	$572	$531	$602
Renter Cost as % of HH Income 30-34%	-	7.4	6.0	**6.7**	7.2	6.9	7.3
Owner Cost as % of HH Income 35% or Greater	26.5	26.5	15.5	**22.8**	25.4	28.6	29.5

There appear to be few rental units on the market, but the price, even for the largest of units, is within the affordable range. The listed rent for a three bedroom unit was just over $1,000, while the affordable limit for the median income is $1,394. Figures from the National Low Income Housing Coalition, a very reliable source, indicate that rents in the Region are, in fact, lower than those of the County as a whole at all unit sizes.

Economic Analysis

Income

An overview of households by income is also useful to the understanding of an area. The educational attainment figures do not present a promising outlook for income levels, but, in this instance, those figures are misleading. The Region had a relatively high income level in 2000, as the **Table A13: Household Income** demonstrates.

Table A13: Household Income – 2000

Income	Manheim	Penn	Rapho	**Average of Combined**	Lancaster	Pennsylvania	Nation
<$10,000	5.3%	3.7%	4.3%	**4.4%**	5.8%	9.7%	9.5%
$10,000-$14,999	5.8%	4.8%	2.8%	**4.5%**	4.9%	7%	6.3%
$15,000-$24,999	14.2%	10.4%	9.8%	**11.5%**	11.9%	13.8%	12.8%
$25,000-$34,999	14.9%	13%	13.3%	**13.7%**	13.1%	13.3%	12.8%
$35,000-$49,999	22.2%	23.3%	19.7%	**21.7%**	19.7%	16.9%	16.5%
$50,000-$74,999	21.7%	27.1%	29.3%	**26%**	23.9%	19.5%	19.5%
$75,000-$99,999	10.2%	12.3%	11.1%	**11.2%**	10.9%	9.6%	10.2%
$100,000-$149,999	3.2%	4.8%	7.9%	**5.3%**	6.7%	6.6%	7.7%
$150,000-$199,999	0.8%	0.3%	1.1%	**0.7%**	1.6%	1.8%	2.2%
$200,000+	1.7%	0.4%	0.7%	**0.9%**	1.5%	1.9%	2.4%
Median HH Income	$41,856	$47,205	$50,063	**$46,375**	$45,507	$40,106	$41,994
Per Capita Income	$21,276	$18,719	$20,412	**$20,136**	$20,398	$20,880	$21,587
% of Persons in Poverty	5.3	4.4	4.1	**4.6**	7.8	11.0	12.4

The income figures for the three municipalities show their relative affluence. The largest percentage of households (47.7 percent) earns between $35,000 and $75,000, and the median household income is 9.5 percent higher than the US figure. There are few wealthy households, but at the same time, there are few very low income households, and the average percentage of persons in poverty in 2000 was about one-third of the national figure. The per capita income figure was below the national figure, but the relatively higher number of persons per household increased the median household income figure.

ESRI projections for the three municipalities show a 2008 median household income of $59,737, and a 2013 projection of $67,122. The 2008 figure is greater than the rate of inflation for the eight year period, which means that incomes are rising consistently and well across the Region. Going forward, ESRI projects that incomes will rise almost three percent in Manheim between 2008 and 2013, two and one-half percent in Penn over the same period, but only 1.7 percent in Rapho.

Labor Supply

The supply of labor in an area is another key decision factor for expanding or relocating businesses. The labor supply in the Region appears to be tight for a number of reasons. The labor market, defined as those persons over the age of 16, was 15,789, according to the 2000 Census. Of this population, 11,386 persons were in the workforce, resulting in a labor force participation rate of 71.6 percent, a very high percentage relative to the state and nation. **Table A14: Labor Force Characteristics** shows these and other labor force statistics.

Table A14: Labor Force Characteristics

	Manheim	Penn	Rapho	**Average of Combined**	Lancaster	Pennsylvania	Nation
In Labor Force	69.3%	71.4%	74%	**71.6%**	67.9%	61.9%	63.9%
All parents in labor force	86.6%	57%	58%	**67.2%**	55.7%	60.2%	58.6%
Work at home	4%	6%	7.5%	**5.8%**	4.8%	3%	3.3%
Commute Time to Work in Minutes	20	19.9	23.9	**21.3**	21.7	25.2	25.5

The percentage of participation in Rapho is especially high, though even that of Manheim, the lowest of the three, is well above the national figure. Manheim has a very high percentage of “all parents in the labor force,” though the Township percentages are close to the national norm. The high percentage of persons working at home is reflective more of workers being employed in home based businesses (farms, small construction contractors and service establishments), than of the presence telecommuters. Commute time to work is low, indicating that most workers are employed in the immediate area.

The upshot of these figures is that high percentage of persons in the workforce, combined with the high percentage of persons of retirement age, indicates that there is little “slack” in the labor market. Many of the people in the labor market are currently working, and the pool of persons who might be induced to seek employment is likely small. Many of these persons likely are stay-at-home parents, disabled, or retired, and not available or interested, even with offers of training or a good wage.

Occupation and Industry

Closely related to the income figures are statistics for occupation and industry of employment for the Region. These data address wage and skills data in an indirect fashion, demonstrating what types of work experience and employment residents have. **Table A15: Percentage of Workers by Occupation and Industry** from the 2000 Census data, reveals that the three municipalities have a higher than average percentage of workers in agriculture and production and transportation occupations, and a significantly lower percentage of management and professional occupations. Sales and office occupations are below national figures, while construction is above the national percentage. The production/transportation figures reflect the strength of manufacturing in the entire Lancaster/York County area. The high percentage of persons in the construction occupations stems from the numerous smaller special trades contractors located in the Region, especially Rapho Township.

In terms of the industries in which residents work, agriculture clearly has a much higher percentage than even the County. Manufacturing and Wholesale are also very well represented in the Region, manufacturing having a fifty percent greater representation than the nation and the Wholesale Trade being twice the national figure. Retail Trades firms are also higher than the national percentage, though the Transportation industry, which is usually strong in proximity to manufacturing operations, is not as prevalent. Other industries, such as real estate, the arts, professional services, and even health and education are relatively weak in the Region in relation to national, state and County figures.

Table A15: Percentage of Workers by Occupation and Industry

Occupation	Manheim	Penn	Rapho	**Average of Combined**	Lancaster	Pennsylvania	Nation
Management/ Professional	23.3%	25.5%	23.8%	**24.2%**	28.1%	32.6%	33.6%
Service	14.8%	14.2%	13%	**14%**	13.9%	14.8%	14.9%
Sales & Office	24.9%	23.8%	21.1%	**23.3%**	24.9%	27%	26.7%
Farming, etc.	-	1.7%	2.5%	**2.1%**	1.1%	0.5%	0.7%
Construction	11.6%	8.1%	14.6%	**11.4%**	10%	8.9%	9.4%
Production/ Transportation	25.4%	26.7%	25%	**25.7%**	22%	16.3%	14.6%
Industry							
Agriculture	0.3%	5.4%	6.1%	**3.9%**	2.9%	1.3%	1.9%
Construction	8%	6.4%	10.9%	**8.4%**	7.7%	6%	6.8%
Manufacturing	24.2%	22.6%	19.4%	**22.1%**	22.5%	16%	14.1%
Wholesale	6.3%	9.2%	7.1%	**7.5%**	4.6%	3.6%	3.6%
Retail	13.4%	14.5%	14.1%	**14%**	13%	12.1%	11.7%
Transportation	2.1%	4.7%	4.8%	**3.9%**	4.3%	5.4%	5.2%
Information	1.5%	1.1%	1.5%	**1.4%**	1.9%	2.6%	3.1%
FIRE	3.6%	3.3%	3.3%	**3.4%**	4.4%	6.6%	6.9%
Professional & Management	4.6%	4.3%	5.4%	**4.8%**	6.7%	8.5%	9.3%
Education & Health	21.4%	17.2%	13%	**17.2%**	18.2%	21.9%	19.9%
Arts, Entertainment & Recreation	4%	5.4%	5.5%	**5%**	6.7%	7%	7.9%
Other Services	9%	5.4%	7.1%	**7.2%**	5.2%	4.8%	4.9%
Public Administration	1.6%	0.5%	1.8%	**1.3%**	2%	4.2%	4.8%

Consumer Spending

Despite their relative affluence, the residents of the Region are frugal. There is a tendency to dine out, and such meals are split between fast food and family restaurants. There is also a marked propensity to shop at convenience stores. Home entertainment appears to be much more common than going out to movies or concerts, as a surprisingly high percentage of homes have four or more televisions, and CD/DVD rentals are high, as is the purchase of DVD players. Travel is limited and vacations are modest. In contrast, spending on pets and home improvements is high.

Statistics from ESRI on the marketplace potential for the Region show that the area has an oversupply of auto dealers, building supply and appliance stores, as well as gasoline stations. This means that these establishments draw people from neighboring areas as customers. In contrast, the Region has relatively few health care and personal care stores, clothing stores, general merchandise and miscellaneous retail stores, and sporting and hobby outlets. This deficit was not raised in the several stakeholder meetings, and very likely does not represent a concern for area residents.

However, the Region does have a significant deficit of eating places according to the statistics, and this observation was made several times in the course of stakeholder meetings. The desire for a wider range of "nicer" eating establishments represents an opportunity for some economic growth.