

ECONOMIC DEVELOPMENT STRATEGIC PLAN

for

COLUMBIA BOROUGH, PENNSYLVANIA

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ACKNOWLEDGEMENTS

The Borough of Columbia would like to acknowledge a long list of residents, business owners, community leaders, local officials, and others interested in the future economic prosperity of Columbia and its local businesses. We extend a special thanks to members of the Economic Development Strategic Plan Advisory Group who provided the supporting documentation in the preparation of this Plan. Funding for this planning effort was provided by the Pennsylvania Department of Community and Economic Development (DCED). We believe that through this strategic plan, we are helping the Commonwealth reach their goal of fostering opportunities for businesses and communities to succeed and thrive in a global economy, thereby enabling Pennsylvanians to achieve a superior quality of life.

Special acknowledgement is due to Melissa Glenn who did not live to see the completion of this Plan. As the Executive Director of the Susquehanna Valley Chamber of Commerce, she devoted countless hours of effort and dedication to the improvement and development of Columbia. We recognize Missy's contributions to this process and to the future of Columbia.

ECONOMIC DEVELOPMENT STRATEGIC PLAN ADVISORY GROUP

ORGANIZATION

Borough of Columbia

Business

Columbia Borough Council

Columbia Borough Planning Commission

Columbia Borough School Board

Columbia Borough Zoning Hearing Board

Columbia Downtown Development Corp.

Columbia Economic Development Corp.

Columbia Ministerium

Community Life Network

Historic Architecture Review Board

Jeri E. Stumpf and Associates

Lancaster County Planning Commission

Old Columbia Public Grounds

Pennsylvania Downtown Center

Rivertownes PA, USA

Susquehanna Valley Chamber of Commerce

The Jay Group

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Mary Wickenheiser, Mary Barninger

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Justin Evans, Theo Robinson

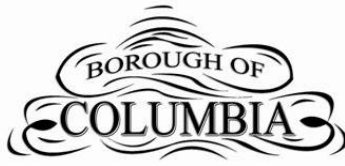
William Kloidt, Jr.

Rebecca S. Denlinger

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Dear Friends,

Columbia Borough and its citizenry, over the past several years, have embarked on a revitalization effort encompassing a comprehensive examination of our community. During this process of study and public discussion, we rediscovered those assets that have contributed to creating and framing our Borough as we presently know it. We are able to categorize these assets into three focus areas: the **downtown business, historic, and riverfront**. Specifically, these three districts comprise the core of the economic footprint of our community and the basis for this Economic Development Strategic Plan.

You will see on the maps included in this plan that each district is contiguous, and therefore affords us the ability to concentrate our energies and develop a strategy to benefit all segments of the Borough. For a number of years, our wonderful community has been economically dormant despite having valued assets not present in many communities across the state. By mobilizing the benefits and qualities of each district, we have created a formidable economic force that will generate a renaissance of municipal improvements with great public benefit. Those familiar with the Borough will recognize that we have started planning for – and in some cases completed – some of these desired improvements.

When reading this document, you will be able to revisit our past, better understand our present, and receive an introduction to plans for the future for each of the three focus areas. You will see the interrelationships between each district and how the plan evolves. This public document represents the thoughtful contributions of many dedicated participants and stakeholders. This is Columbia's guide to the future – an informative document for local officials, investors, and all the Borough's vested citizens.

As the Mayor and Council President of Columbia Borough, Pennsylvania, we are delighted to share this exciting plan for a new tomorrow.

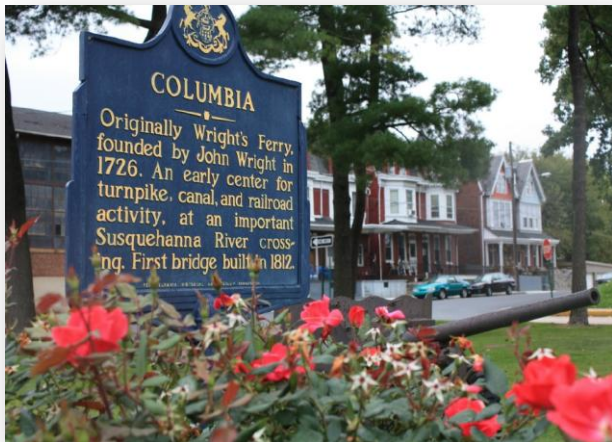
With best personal wishes,

Leo Lutz
Mayor

Mary Wickenheiser
Borough Council President

VISION STATEMENT

Restore Columbia as a thriving and vibrant community by implementing an economic growth strategy focused upon the downtown business and historic districts and the riverfront. The interaction and melding of these cornerstones that comprise the community's core economic footprint will enrich the lives of our residents and provide a unique and valuable experience to those who visit.



INTRODUCTION / CHALLENGE

The socio-economic vitality of a community rests in the sound ability of local government to manage the present with full knowledge of the past, in order to grasp a clear view of the future. Over the past several years, Columbia Borough initiated an aggressive program of community revitalization. The Borough conducted many public meetings solely devoted to determining the best avenues for conservation, growth and sustainable prosperity. These efforts focused primarily on the downtown rather than holistic considerations. Today, as the Borough's revitalization planning and programming moves forward, progress is evidenced by a broader – yet more defined – approach that has resulted in a strategic plan for economic development.



Pursuit of the new direction evolved from a combination of municipal actions directed toward securing state and federal monies for designated projects. The consensus among local officials, community leaders, and all potential project partners stressed that future funding requests should rest under the guiding eye of an umbrella document. To that end, the Borough decided to pursue an Economic Development Strategic Plan for Columbia. An Advisory Group representing a broad base of the community directed and completed this planning work with the collective aim of creating a document that identifies the areas that serve as the community's economic footprint.

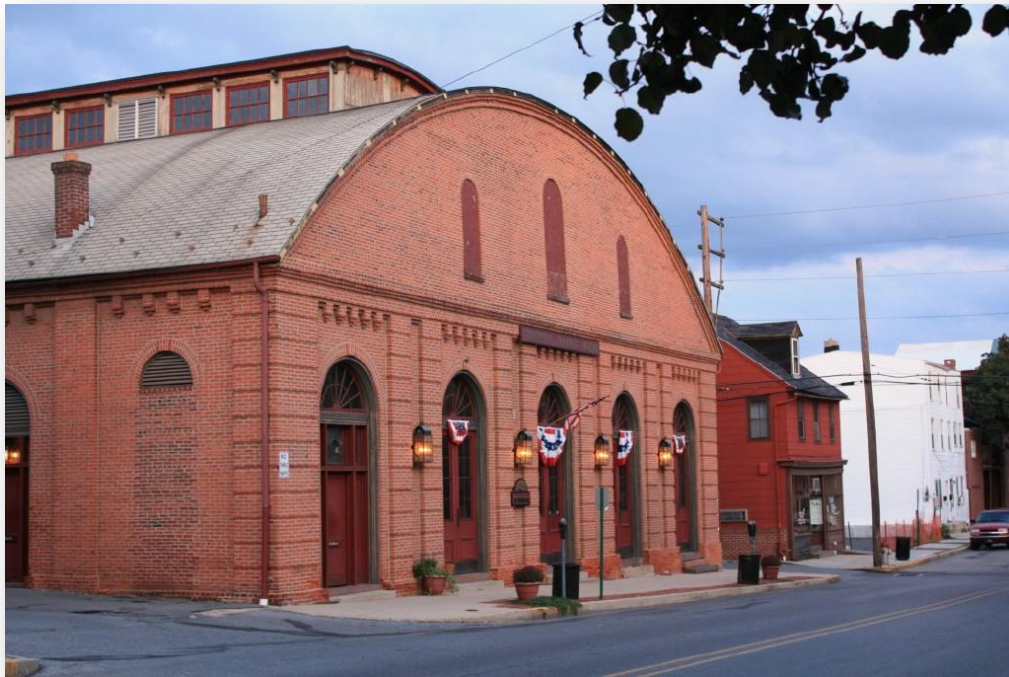


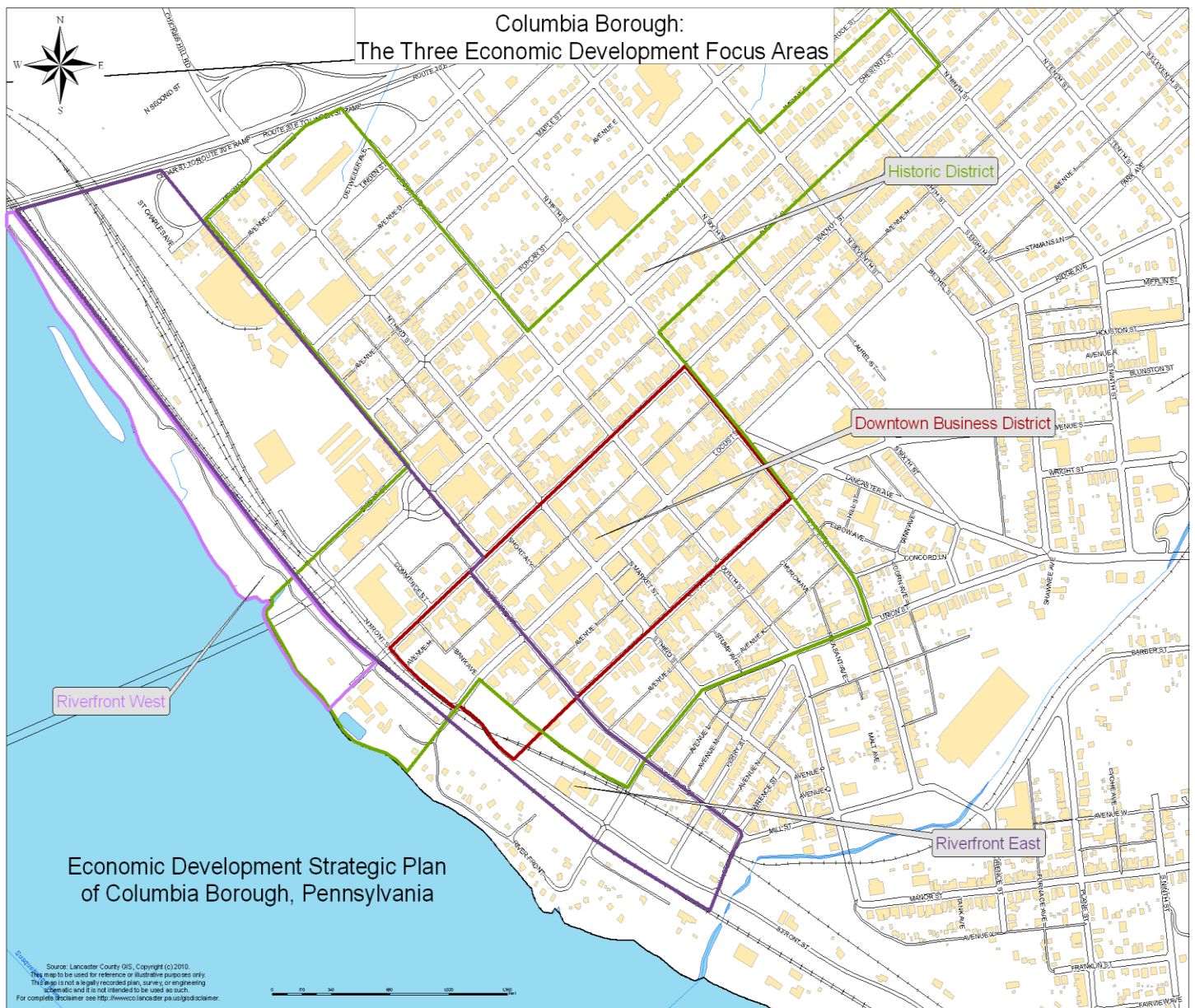
The framework for achieving this goal centers on three interrelated districts, the Riverfront, Downtown Business and Historic neighborhoods. Collectively, they comprise the major ingredients that will determine the economic pulse of the community. The committee's designation of these three areas as the community's economic footprint represents the key to catalyze a renaissance of growth throughout the Borough.

The challenges presented to the Advisory Group in preparing an economic development strategy for Columbia encompassed a number of significant considerations:

- Melding the footprint into a viable economic force
- Revitalizing all aspects of community life within the Borough
- Developing action programs that will result in measurable public benefit
- Hallmarking Columbia as a community of interest to citizens and visitors
- Improving the socio-economic experience of Borough residents

The primary and most important achievement of the Advisory Group has been their foresight in identifying the three areas that together represent the Borough's past, present and future. This key determination allowed and enabled the planning process to unfold with clarity and purpose. Columbia's Economic Development Strategy Plan incorporates a wide range of issues from these three unique but strongly linked districts within the Borough. The Plan conveys the understanding that success in one district will directly impact the progress and potential of the others.





HISTORY

Before there was Columbia, there was the land and the river. The combination naturally proved a draw to human settlement. Native Americans, of course, were the first to reach this area before Europeans arrived on the scene and began recording what they found. The new arrivals noted that there was a small settlement by the mouth of what is now known as Shawnee Run and called it Shawanah Town. This was smaller than the Washington Boro site downstream that the Susquehannocks occupied.



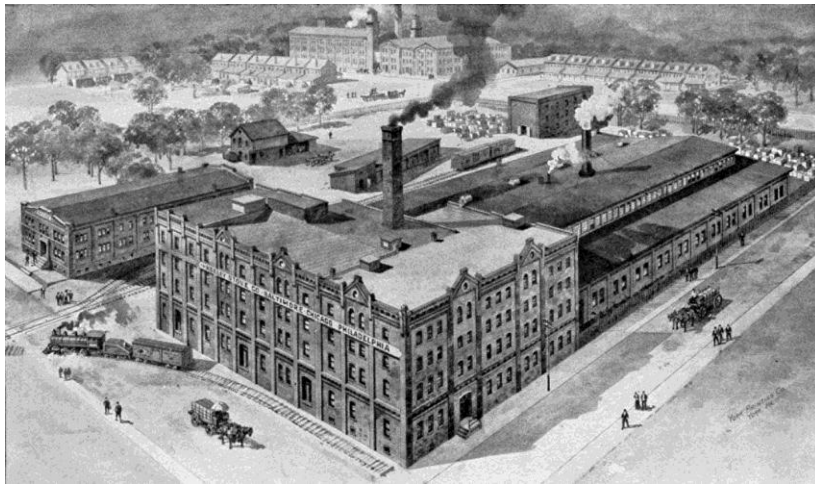
The Pennsylvania Railroad 1897 bridge crossed the Susquehanna on piers that once carried the covered bridge burned on June 28, 1863 to thwart advancing confederates. The Pennsylvania Canal basin, terminus of the canal's Eastern Division, is on the left while the canal outlet is in the center. The canal proper goes off right towards Marietta. On the land side of the canal is the Pennsylvania Railroad yard.

In 1724, John Wright, an English Quaker preacher, went west towards the Susquehanna River. He preached to the natives and also made note of the land's many favorable qualities. Two years later Wright, Robert Barber, and Samuel Blunston all arrived near Shawanah Town. Through a series of sales and purchases traceable back to William Penn the three all had the right, in the eyes of English law, to settle the land.

John's grandson, Samuel, inherited his Aunt Susanna's 100-acre farm. As he always felt the area would be a good location for a town, he surveyed the farm, laid out the streets, and divided the land into 160 lots in 1788. Streets generally received tree and number names. Unlike Lancaster to the east and York to the west, Columbia's founding came after the revolution and so none of the streets received royal names such as King, Queen, Prince, or Duke. A lottery on July 25, 1788 chanced off the lots with tickets, or "adventures" as they were known, each costing 15 shillings. Samuel named Columbia after the explorer Columbus. A year later, Congress was debating where to locate a capital for the new United States of America. Men from the Pennsylvania delegation advanced Columbia's name, but the southern delegations held out, arguing successfully that it should be farther south resulting in Washington, D.C. being founded as the capital.

Ferry traffic across the Susquehanna ultimately became so great investors could justify a bridge. The first bridge was built in 1812, and was located upstream of the remaining bridge piers and downstream of the 1972 US 30 Wrights Ferry Bridge, and was the longest covered bridge in the world. Spring floods destroyed it in 1832.

By 1814, the village separated from Hempfield Township, received its incorporation from the Commonwealth of Pennsylvania and became Columbia Borough. The first census as a Borough did not happen until 1830 when the town had 2,046 residents. That year the canal segment from Chickies to



Keeley Stove Company used this pen and ink birds-eye view for many years in its catalogs and on its letterhead. The complex occupied one square block bounded by Second, Third, Maple, and Linden Streets. The offices, machine shop, and pattern shop were in the two-story building to the left. In the four-story building at the center were casting, cleaning, and storage, while the foundry occupied the low building on the right. Pictured in the background is the Schwarzenbach Huber Company silk mill.

Columbia opened as part of the Eastern Division of the Main Line of Public Works of Pennsylvania, a series of canals and railroads that ran from Philadelphia to Pittsburgh. The whole system opened for business in 1834 with the eastern part being the Philadelphia and Columbia Railroad.

Near where the Susquehanna Fire & Rescue Company #4 is today, the railroad had a stationary steam engine that winched cars up and down an inclined

plane between Manor Street and the river. Cars then continued on level tracks to and from the canal basin near the north end of town. Plane Street got its name from that operation whose tracks crossed it.

With transportation improvements and even before them came new arrivals in town. Among them were Germans, Scotch-Irish, and African-Americans, who arrived as escaping slaves, freed slaves, or even slaves. Among the last was Stephen Smith born into slavery in Dauphin County in 1795. Bought by Revolutionary War soldier Colonial Thomas Boude, Smith ultimately came to run Boude's lumber business. After he bought his freedom, he set up his own lumber business by the river and grew it until he moved to Philadelphia, partly forced to do so because of race riots. Ultimately he became one of the wealthiest blacks in the country, being worth over \$1,000,000 in mid-1850s dollars.

At the beginning of the Civil War, many Columbians volunteered for Pennsylvania union units, but African-Americans had to wait until 1863 when many of them traveled north to enlist with the first black unit, the 54th Massachusetts. Later still many went to join black units forming in Philadelphia. On June

28, 1863 the Civil War arrived at Columbia's doorstep when Confederate General Gordon battled Union militia outside Wrightsville and routed them. Volunteers then set fire to the bridge, built in 1834, and completely burned it down. A replacement bridge went up in 1869.

Before the Civil War railroad lines that would become part of the Pennsylvania Railroad arrived in town from York to the west and Harrisburg to the north, joining the P&C, which too went into the Pennsylvania Railroad. During the war the Reading & Columbia joined its two namesake places, while after the war contractors finished the line running south along the river to Maryland. With good transportation and a willing and able work force both Columbia's population and industries continued to grow after the war. Population reached 6,461 in 1870. Keeley Stove Company, Columbia Wagon Company, Ashley & Bailey Silk Mill, and Columbia Lace Company joined anthracite iron furnaces and affiliated rolling mills as the nineteenth century continued into its last half. In only 30 years, by 1900, the population had almost doubled to 12,316.



This 1913 photo shows downtown along Locust Street west towards the river. Schroeder and Hinkle, predecessor of today's Hinkle's Pharmacy is in the foreground. Wolf's Restaurant (with a "Lunch" sign in front of it) lies to the left. Some other stores on this block were Bernard's Milliner, Philadelphia Shoe Store, Western Union, Watt & Shand Department Store, Columbia National Bank, Jacob Goldman Ladies' & Children's Outfitters, Richards & Eckman (books, stationary, and wallpaper) and I. A. Fuld, Clothier & Gent's Furnisher. Above the stores professionals such as attorney Hugh M. North, Jr. often had offices.

Right after the war in 1866, Columbia reincorporated and in the process eliminated the position of assistant burgess. The town built a new market house, opening it in 1871, to serve its rapidly expanding population. Only two years later, a 1200-seat Opera House was built that also housed Borough offices and other shops. The first four blocks of Locust Street gradually emerged as the downtown with clothing and shoe stores, pharmacies, banks, restaurants, hotels, hardware stores, and other merchants.

In town, tight-knit neighborhoods were continuing to develop and acquired unique nicknames. Some of the earliest were Fishtown around Perry Street and Shadtown on North Second, both named because of the fisherman that owed their livelihoods to the Susquehanna's bounty. Five Points got its name because of the physical junction of South Fourth, Union, and Perry Streets. Many African-Americans settled around South Fifth known as the Tow Hill area. Rink Row on Plane Street had its name originate from the wood that went into homes originally came from a roller rink. German settlers along Manor Street who built their own homes starting with the kitchen and living in it while finishing the rest gave Kitchen Town its name. Classic corner grocery stores sprang up in these and other neighborhoods across town.

Newspaper coverage of Columbia started even before it became a Borough with the *Susquehanna Waterman* in 1811. Two of the most prominent newspapers that started in the 1800s and continued into the twentieth century were the *Columbia Spy* and the *Columbia News*. Public schools grew so that in addition to the high school there were five elementary schools and two parochial schools. Both the library and hospital grew and relocated to accommodate further growth. The latter also had a nursing school adjacent to it at its new location. Churches grew, divided, and new ones started until many denominations represented Columbia's diverse ethnicities.



Looking east along Locust Street towards the intersection with Third Street. On the right is the Opera House, which in addition to being true to its name also housed the Borough office and small shops. In the left is Moses Bachenheimer's Clothing and Gent's Furnishing store in Eagle Hall. The trolley traveled around town on the same route its successor, Red Rose Transit, uses for its bus route.

Columbia Water Company started supplying water in 1823 and is said to be the third oldest water company in the Commonwealth. The pumping station is located on the river at the foot of Walnut Street and its office is on Locust Street. Other infrastructure companies emerged included locally owned gas, telephone, and power companies, but larger companies all eventually absorbed them.

In 1896, a hurricane destroyed the bridge, but the following year the Pennsylvania Railroad repaired the piers and put up a steel bridge, it being the third to go on the existing piers. The bridge also handled vehicular traffic, but trains had the right of way and they could cause long back-ups when they exercised that right.

Originally Columbia was divided into three, roughly equal, voting wards that started at the river and ran eastwards. However, so much growth had occurred that realignment into nine wards was in order.

The 1890s saw the trolley from Lancaster reach town. The line looped around town giving passengers only a few blocks to walk to catch a convenient trolley to the county seat. As the line ran the length of Manor Street it opened the east end of town to housing development that continued into the first half of the next century.

The trolley also had a Marietta extension linking that river town to Columbia and Lancaster. On that line, the company developed a park at Chickies Rock that was a good destination for townspeople looking for a cool picnic spot on hot summer days.

The Pennsylvania Railroad built its Atglen & Susquehanna Branch through town in the early 1900s and, as a result, the railroad eliminated some jobs in town and moved others to the Harrisburg area. This was

one of the causes for Columbia's first decrease in population to 11,454 in 1910. By the 1920s, the vehicular traffic on the Pennsylvania Railroad bridge had become so great and traffic jams so long that motorists on both sides of the river began calling for a new bridge just for motor bridges. Lancaster and York counties formed a bridge commission that erected a new concrete arch highway bridge that opened in 1930 and was boasted as the longest bridge of its kind in the world at that time.

Throughout the twentieth century, there was constant change in Columbia's manufacturing segment. Changing tastes, materials, and economies of scale, coupled with manufacturing techniques of the stove, laundry machinery, clothing manufacturing, and lace industries, Columbia began to experience a decline in the production of these goods and services. On the other hand, Columbia Malleable Casting Corporation outgrew its location at North Second and Linden Street, moved to the east end of town, built a new plant, became Grinnell, and later Anvil International. Today, the company is the world's largest manufacturer of pipe fittings and hangers. Post-World War II Colonial Metals began operations at the Malleable's old site and ultimately took over the Keeley Stove Company site. They are one of the country's largest producers of high quality copper base alloy ingots.



In the latter part of the twentieth century, Columbia's elementary schools consolidated into two with larger and better facilities and the parochial schools combined into one, Our Lady of the Angels.

As was true with most small town business districts, Columbia's downtown at first lost stores to the big boxes, but now is regaining traction as business owners rediscover old niche markets and take advantage of newly emerging ones.

In the twenty-first century, Columbia will continue to reinvent itself and keep in mind the motto of 1913's Old Home Week: "Columbia Onward! Why Not?"

MARKET ASSESSMENT

Today many of Pennsylvania's Boroughs are exploring a variety of avenues to promote economic rebirth. The economic and social viability of these communities have become the unavoidable victims of progress that has severely eroded the foundations which built and sustained them. Columbia, like her sister Boroughs, has experienced a similar fate; however, the underlying ingredients that produced a vibrant community have remained quietly beneath the surface of prosperity. The intent of this economic development effort is to revive those dormant qualities that will enable Columbia Borough to become a vibrant community once again.

COLUMBIA BOROUGH MARKET ASSESSMENT

SUMMARY (BENCHMARK: THE UNITED STATES/2008)

Understanding the community's buying power and its capacity for expansion must include full consideration of essential demographic factors. The following summary examines six benchmark areas utilized in forecasting growth. The population statistics reveal a 2.6% decline in population from 2000 to 2008. This trend will continue for the next five years, albeit at a lesser average decrease of 1.5% annually. The numbers of households, during the same period, also follows a lesser downward trend but are projected to increase over the next five years. The remaining benchmarks indicate household income increases while the remaining areas demonstrate stable and positive figures for the Borough.



POPULATION

COLUMBIA BOROUGH

- The population in Columbia is estimated to change from 10,311 to 10,010, resulting in a decline of 2.9% between the year 2000 and 2008.
- Through 2013, Columbia's population is projected to decline by 1.5%.
- The 2008 median age for Columbia is 38.6, and the average age is 39.6. Five years from now, the median age is projected to be 39.6.

UNITED STATES

- The population in the United States is estimated to change from 281,421,906 to 304,141,549, resulting in a growth of 8.1% between 2000 and the current year.
- Through 2013, the US population is expected to grow by 4.9%.
- The 2008 median age for the United States is 36.7, while the average age is 37.5. Five years from now, the median age is projected to be 37.7.

■ Of Columbia's 2008 population:

- 89.6% are White alone,
- 5.1% are Black or African American alone,
- 0.2% are American Indian or Alaska Native alone,
- 0.5% are Asian alone,
- 0.1% are Native Hawaiian or other Pacific Islander alone,
- 2.1% are Some Other Race, and
- 2.4% are Two or More Races

■ Columbia's 2008 estimated Hispanic or Latino population is 5.8%.

■ For the United States:

- 72.7% are White alone,
- 12.4% are Black or African American alone,
- 0.9% are American Indian or Alaska Native alone,
- 4.4% are Asian alone,
- 0.2% are Native Hawaiian or other Pacific Islander alone,
- 6.6% are Some Other Race, and
- 2.8% are Two or More Races

■ The United States 2008 estimated Hispanic or Latino population is 15.2%.

HOUSEHOLDS

COLUMBIA BOROUGH

■ The number of households in this area is estimated to change from 4,287 to 4,272, resulting in a decline of -0.3% between 2000 and 2008. Over the next five years, the number is expected to increase by 0.3%.

UNITED STATES

■ The number of households in the United States is estimated to change from 105,480,101 to 114,694,201, resulting in an increase of 8.7% between 2000 and 2008. Over the next five years, the number is projected to increase by 5.3%.

HOUSEHOLD INCOME

COLUMBIA BOROUGH

■ The average household income is estimated to be \$47,886 for the 2008.

■ The average household income in this area is projected to increase 10.0% over the next five years, from \$47,886 to \$52,666.

■ The 2008 estimated per capita income for this area is \$20,825.

UNITED STATES

■ The average household income for the United States is estimated to be \$67,918 for the 2008.

■ The United States is projected to have an 11.7% increase in average household income.

■ The 2008 estimated per capita income for the United States as a whole is \$25,933.

EMPLOYMENT

COLUMBIA BOROUGH

■ For this area, 79.0% of the population is estimated to be age 16 and over for 2008. The employment status of this labor force is as follows: 0.0% are in the armed forces, 60.7% are employed civilians, 3.3% are unemployed civilians, 36.0% are not in the labor force.

UNITED STATES

■ For the United States, 78.4% of the population is estimated to be age 16 and over for 2008. Of this labor force: 0.5% is in the Armed Forces, 60.2% are employed civilians, 3.6% are unemployed civilians, and 35.7% are not in the labor force.

■ For this area, 48.0% of the population is estimated to be employed and age 16 and over for 2008. The occupational classifications are as follows: 44.0% have occupation type blue collar, 38.2% are white collar, and 17.9% are service & farm workers.

■ For the civilian employed population age 16 and over in this area, it is estimated that they are employed in the following occupational categories: 6.4% are in "Management, Business and Financial Operations," 8.7% are in "Professional and Related Occupations," 17.7% are in "Service," and 23.1% are in "Sales and Office." 0.1% is in "Farming, Forestry and Fishing," 9.9% are in "Construction, Extraction, and Maintenance," and 34.0% are in "Production, Transportation, and Material Moving."

■ For the United States, 47.2% of the population is estimated to be employed and age 16 and over for 2008. The occupational classifications are as follows: 23.9% have occupation type blue collar, 60.1% are white collar, and 16.0% are service & farm workers.

■ For the civilian employed population age 16 and over in the United States, it is estimated that they are employed in the following occupational categories: 13.7% are in "Management, Business and Financial Operations," 20.3% are in "Professional and Related Occupations," 14.6% are in "Service," and 26.7% are in "Sales and Office." 0.7% is in "Farming, Forestry and Fishing," 9.5% are in "Construction, Extraction, and Maintenance," and 14.4% are in "Production, Transportation, and Material Moving."

EDUCATIONAL ATTAINMENT

COLUMBIA BOROUGH

■ In 2008, it is estimated that 3.2% of the population over 25 in this area had earned a Masters. Professional, or Doctorate Degree and 5.3% had earned a Bachelor's Degree.

UNITED STATES

■ In comparison, for the United States, it is estimated that 8.9% of the population over 25 in this area had earned a Masters. Professional, or Doctorate Degree and 15.8% had earned a Bachelor's Degree.

DWELLINGS

COLUMBIA BOROUGH

■ Most of the dwellings (60.4%) in this area are estimated to be Owner Occupied for 2008.

■ The majority of dwellings in this area (44.8%) are estimated to be "attached single units" for 2008.

■ The majority of housing units in this area (57.5%) are estimated to have been built in 1939 or earlier.

UNITED STATES

■ For the entire country, the majority of housing units are Owner Occupied.

■ In the United States, the majority of dwellings are estimated to be "detached single units".

■ Most of the housing units in the United States (16.2%) are estimated to have been built between 1970 and 1979.

COMMUNITY TAX INFORMATION

Property owners and residents of Columbia Borough are assessed the following taxes:

- Real Estate Property Taxes
 - Lancaster County
 - Columbia Borough
 - Columbia Borough School District
- Earned Income Tax
- Local Municipal Services Tax
- Real Estate Transfer Tax
- Per Capita Tax

The income from these tax revenues fund the Columbia Borough School District K-12 schooling, as well as Columbia Borough Municipal Services that include a full time police department, a Borough Manager, Codes Department, Public Service Department, and wastewater treatment services. Additionally financial support is provided to the Borough's volunteer fire departments, emergency medical services organizations, fire police, public library, athletic associations and Shade Tree Commission.

The current tax rates are available on the Borough's Web Site www.columbiapa.net.

MARKET ASSESSMENT: COLUMBIA BOROUGH CONSUMER BUYING & RETAIL MARKET POWER

The Market Assessment is designed to examine both internal and external impacts on the Borough's economy. All factors, when properly viewed, should provide local officials with a clear panorama of municipal considerations. It is from these facts and assumptions that Columbia can find a legitimate basis to determine future actions.

Economic revitalization efforts in municipalities with a strong population base must recognize and aim to capture the consumer buying power of its residents. The success in identifying the buying habits of residents is a key indicator of the categorical market strengths within the local economy. Data obtained from Caritas 2008, outlining the Borough's consumer buying power, indicates an annual average growth of 3.62 % projected over a five-year period, as shown on **Table 1: Columbia Borough Consumer Buying Power**. The annual percentage of growth focuses on purchasing trends within several broad based consumer fields. Without question, the average growth increase is a positive sign for the Borough.

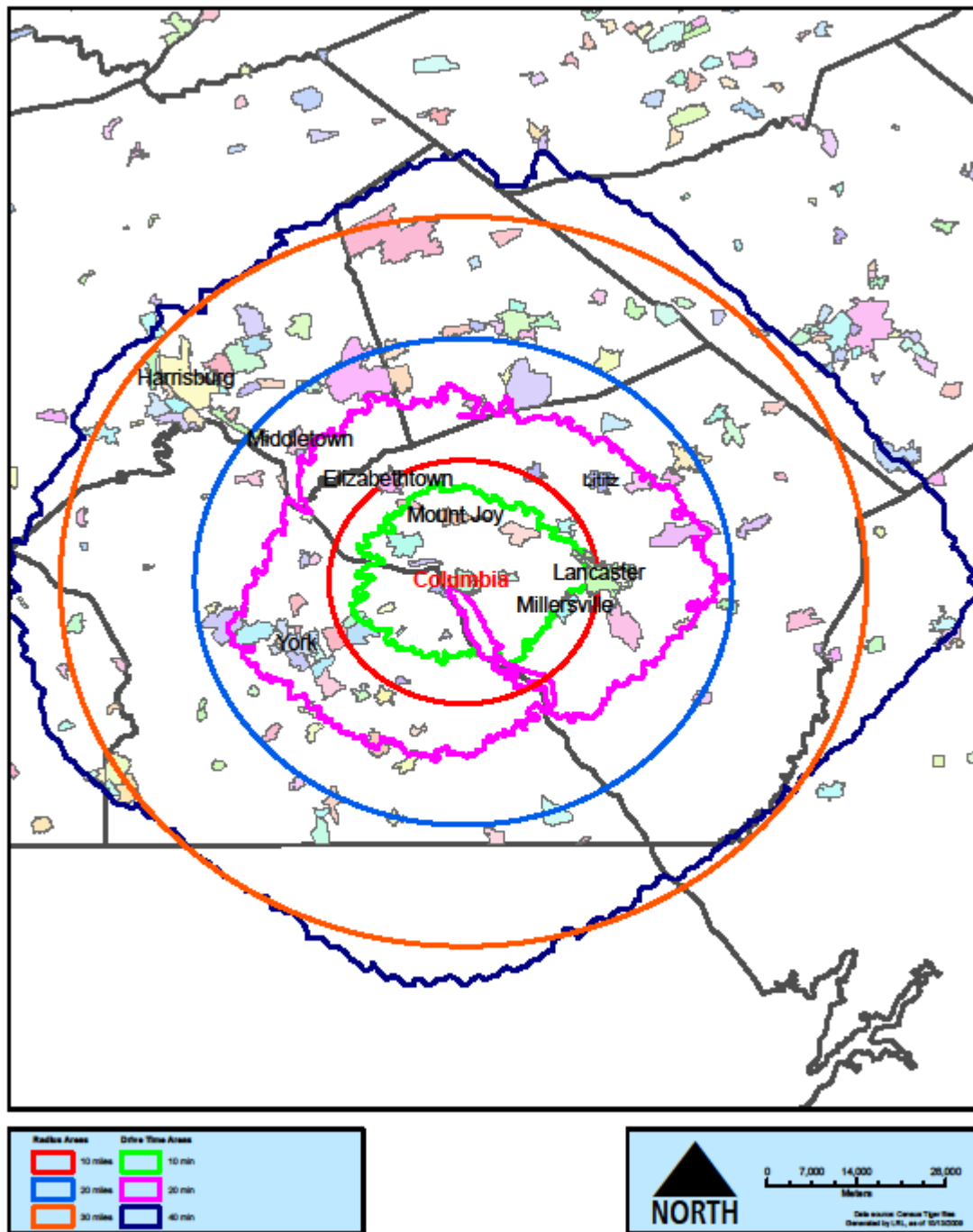
Table 2: Columbia Borough Retail Market Power (Opportunity Gap Report), conveys a more detailed economic assessment and outlines specific categories under retail sales including eating and drinking establishments. The conclusions Columbia may draw from these aggregate figures demonstrate both the strengths and weaknesses within specified retail fields. Local officials, based upon the known aggregates, are afforded the opportunity to evaluate various economic fields wherein administrative and financial resources can be directed. Specifically, the aggregate figure shown for the Demand for Consumer Expenditures represents the amount expended in 2008, while the figure for Supply of Retail Sales indicates the amount of sales generated by the type of retail businesses within the Borough. The difference between the two prior fields, as shown under the Opportunity Gap Surplus/Shortage, is the areas wherein the Borough can pursue measures to address the evident shortfalls.

Uncovering areas of opportunity within a market is difficult for retailers in today's fast-paced business environment. The Retail Market Power (RMP) database provides an actionable portrait of sales opportunity for optimal site and market analysis, in order that a community can maximize growth strategies accurately targeting the sales gaps that exist in the marketplace. By employing sales potential to depict supply and demand within a specific market, retail market power enables an opportunity gap analysis of the retail environment. With RMP, a community can leverage its market share analysis and plan accordingly to capitalize on unmet demand in current or new markets. Consequently, by accessing retail market power data, the Borough will be able to consider the following:

- Analyze sales patterns for different locations and refine their site and market analyses
- Determine new areas of opportunity retail sales and optimize market planning
- Compare the supply side and demand-side of retail sales for a complete analysis of markets.

The statistical data outlined thus far has been focused on internal buying power within the Borough and the strengths and weaknesses in the retail market. In order to give full view or a complete assessment of Columbia's retail market, comparative data from municipalities within the region must be analyzed. To enable this process, the market was defined by two criteria: a drive time not to exceed forty minutes and radius areas ten to thirty miles. Geographically, seven municipalities that include three cities and four Boroughs comprise the study area. The **Columbia & Adjacent Study Areas** map and related **Table 3: Geographic Summary** identify and outline a summary of each of the comparative communities.

Columbia & Adjacent Study Areas





COLUMBIA'S REGIONAL LOCATION

Located approximately 80 miles from Baltimore and Philadelphia and 160 miles from New York City, Columbia Borough in Lancaster County boasts close proximity to major East Coast metropolitan markets. In fact, 50% of the U.S. population lives within 500 miles of Lancaster County.

Table 3: Geographic Summary

	Columbia Borough	Lancaster City	Harrisburg City	York City	Lititz Borough	Elizabethtown Borough	Mount Joy Borough	Middletown Borough
2008 Estimates								
Total Population	10,010	54,783	46,854	39,992	9,058	12,001	7,147	8,767
Total Households	4,272	20,282	19,867	15,837	3,864	4,442	3,092	3,905
Land Area, Square Miles								
Land Area, Acres	1,561	4,735	5,190	3,331	1,488	1,666	1,501	1,304
Persons/Acre	6	12	9	12	6	7	5	7

Data Source: Claritas 2008
Prepared on 9-30-2009
Lancaster County Planning Commission

Understandably the population of the cities exceeds that of the Boroughs; however, the area of focus is the retail market power of each municipality. It is within this arena that the statistics will present the most viable fields for local investment, as well as, the expenditure of more dollars in the community. The subsequent tables draw the comparative economic resources wherein surpluses and shortages can be used as a monitor and guide for future growth and investment within Columbia Borough. (See appendix.)

Table 1: Columbia Borough Consumer Buying Power

Consumer Buying Power	2008 Aggregate Expenditure Estimate	%	2013 Aggregate Expenditure Estimate	%	2008 Annual Average per Household	2013 Annual Average per Household	Average Annual Growth (%)	2008 Market Index to USA
TOTAL SPECIFIED CONSUMER EXPENDITURES	\$180,720,880		\$213,388,988		\$42,304	\$49,799	3.62%	83
FOOD AT HOME	\$28,058,769	14.42%	\$27,781,035	13.02%	\$6,100	\$6,483	1.32%	97
Bakery Products	\$2,829,086	1.57%	\$2,865,674	1.34%	\$662	\$669	0.26%	104
Cereals & Cereal Products	\$1,236,150	0.68%	\$1,202,091	0.56%	\$289	\$281	-0.55%	100
Dairy Products	\$2,940,591	1.63%	\$3,143,121	1.47%	\$688	\$734	1.38%	102
Fresh Milk & Cream	\$698,902	0.39%	\$738,765	0.35%	\$164	\$172	1.14%	97
Other Dairy Products	\$1,969,520	1.09%	\$2,095,578	0.98%	\$461	\$489	1.28%	104
Fats & Oils	\$257,400	0.14%	\$289,629	0.14%	\$60	\$68	2.50%	101
Fish & Seafood	\$634,142	0.35%	\$774,041	0.36%	\$148	\$181	4.41%	106
Fruits & Vegetables	\$3,198,582	1.77%	\$3,452,565	1.62%	\$749	\$806	1.59%	99
Juices	\$929,050	0.51%	\$978,400	0.46%	\$217	\$228	1.06%	111
Meats (All)	\$4,894,195	2.71%	\$4,964,782	2.33%	\$1,146	\$1,159	0.29%	98
Non-Alcoholic Beverages	\$2,829,911	1.57%	\$2,897,803	1.36%	\$662	\$676	0.48%	92
Prepared Foods	\$4,748,416	2.63%	\$5,604,626	2.63%	\$1,112	\$1,308	3.61%	86
Sugar & Other Sweetens	\$1,561,246	0.86%	\$1,608,303	0.75%	\$365	\$375	0.60%	97
FOOD AWAY FROM HOME & ALCOHOL	\$25,068,072	13.87%	\$30,242,961	14.17%	\$5,868	\$7,058	4.13%	91
Alcoholic Beverages	\$5,290,239	2.93%	\$6,311,459	2.96%	\$1,238	\$1,473	3.86%	88
Alcoholic Beverages at Home	\$3,458,225	1.91%	\$4,281,941	2.01%	\$810	\$999	4.76%	86
Alcoholic Beverages Away from Home	\$1,832,014	1.01%	\$2,029,518	0.95%	\$429	\$474	2.16%	91
Food Away from Home	\$19,777,833	10.94%	\$23,931,502	11.21%	\$4,630	\$5,585	4.20%	92
Lunch	\$5,440,712	3.01%	\$7,083,691	3.32%	\$1,274	\$1,653	6.04%	89
Dinner	\$5,827,319	3.22%	\$6,331,988	2.97%	\$1,364	\$1,478	1.73%	95
Breakfast & Brunch	\$1,717,156	0.95%	\$2,348,458	1.10%	\$402	\$548	7.35%	94
FOOD & BEVERAGES BY CHANNEL*								
* Includes items categorized elsewhere								
Food/Goods/Beverages at Grocery Stores	\$22,268,133	12.32%	\$22,797,724	10.68%	\$5,213	\$5,320	0.48%	95
Food/Non-Alcoholic Beverages at Convenience Store	\$2,598,572	1.44%	\$2,737,711	1.28%	\$608	\$639	1.07%	115
Food/Non-Alcoholic Beverages at Grocery Store	\$23,932,709	13.24%	\$26,013,148	12.10%	\$5,602	\$6,071	1.74%	94
DAY CARE, EDUCATION & CONTRIBUTIONS	\$10,050,094	5.56%	\$12,096,164	5.67%	\$2,353	\$2,823	4.07%	61
All Day Care	\$901,615	0.50%	\$1,058,601	0.50%	\$211	\$247	3.48%	68
Contributions (All)	\$4,475,899	2.48%	\$4,939,800	2.31%	\$1,048	\$1,153	2.07%	56
Education	\$4,672,580	2.59%	\$6,097,763	2.86%	\$1,094	\$1,423	6.10%	65
Room & Board	\$201,306	0.11%	\$232,821	0.11%	\$47	\$54	3.13%	41
Tuition & School Supplies	\$4,471,274	2.47%	\$5,864,942	2.75%	\$1,047	\$1,369	6.23%	67
HEALTHCARE	\$15,351,856	8.49%	\$20,959,801	9.82%	\$3,594	\$4,891	7.31%	84
Medical Services	\$7,193,077	3.98%	\$8,701,224	4.08%	\$1,684	\$2,031	4.19%	89
Drugs	\$7,596,680	4.20%	\$11,580,241	5.43%	\$1,778	\$2,703	10.49%	80
Medical Supplies	\$562,099	0.31%	\$678,336	0.32%	\$132	\$158	4.14%	84
HOUSEHOLD FURNISHINGS & APPLIANCES	\$9,209,284	5.10%	\$10,553,888	4.95%	\$2,156	\$2,463	2.92%	74
Furniture	\$2,595,872	1.44%	\$3,033,069	1.42%	\$608	\$708	3.37%	76
Bedroom Furniture	\$754,556	0.42%	\$853,894	0.40%	\$177	\$199	2.63%	80
Living/Dining Room Furniture	\$1,121,485	0.62%	\$1,255,961	0.59%	\$263	\$293	2.40%	74
Other Furniture	\$719,831	0.40%	\$923,214	0.43%	\$168	\$215	5.65%	74
Household Textiles	\$1,805,641	1.00%	\$2,042,864	0.96%	\$423	\$477	2.63%	71
Domestic Textiles	\$893,749	0.49%	\$1,011,407	0.47%	\$209	\$236	2.63%	77
Window & Furniture Covers	\$911,892	0.50%	\$1,031,457	0.48%	\$213	\$241	2.62%	66
Major Household Appliances	\$1,147,241	0.63%	\$1,268,438	0.59%	\$269	\$296	2.11%	83
Miscellaneous Household Equipment	\$1,663,252	0.92%	\$1,935,710	0.91%	\$389	\$452	3.28%	77
Small Appliances & Housewares	\$1,997,278	1.11%	\$2,273,807	1.07%	\$468	\$531	2.77%	70
HOUSING RELATED & PERSONAL	\$18,614,838	10.30%	\$20,870,734	9.78%	\$4,357	\$4,871	2.42%	86
Housing Expenses	\$5,633,935	3.12%	\$6,093,239	2.86%	\$1,319	\$1,422	1.63%	102

Data Source: Claritas 2008
Prepared on 9-24-2009
Lancaster County Planning Commission

Table 1: Columbia Borough Consumer Buying Power

Consumer Buying Power	2008 Aggregate Expenditure Estimate	%	2013 Aggregate Expenditure Estimate	%	2008 Annual Average per Household	2013 Annual Average per Household	Average Annual Growth (%)	2008 Market Index to USA
Fuels & Utilities	\$1,962,131	1.09%	\$1,776,384	0.83%	\$459	\$415	-1.89%	225
Telephone Services	\$3,671,804	2.03%	\$4,316,855	2.02%	\$860	\$1,007	3.51%	79
Household Repairs	\$3,579,184	1.98%	\$4,109,930	1.93%	\$838	\$959	2.97%	72
Household Services	\$2,178,465	1.21%	\$2,616,214	1.23%	\$510	\$611	4.02%	88
Housekeeping Supplies	\$1,443,212	0.80%	\$1,541,824	0.72%	\$338	\$360	1.37%	93
Personal Expenses and Services	\$5,780,042	3.20%	\$6,509,527	3.05%	\$1,353	\$1,519	2.52%	80
PERSONAL CARE & SMOKING PRODUCTS								
	\$9,156,329	5.07%	\$10,032,332	4.70%	\$2,143	\$2,341	1.91%	112
Personal Care Products & Services	\$4,031,590	2.23%	\$4,513,802	2.12%	\$944	\$1,053	2.39%	89
Personal Care Services	\$1,840,613	1.02%	\$2,259,609	1.06%	\$431	\$527	4.55%	88
Smoking Products & Supplies	\$5,124,739	2.84%	\$5,518,730	2.59%	\$1,200	\$1,288	1.54%	142
PET EXPENSES								
	\$1,687,454	0.93%	\$2,090,564	0.98%	\$395	\$488	4.78%	75
SPORTS & ENTERTAINMENT								
	\$18,893,055	10.45%	\$22,508,103	10.55%	\$4,423	\$5,253	3.83%	76
Photographic Equipment/Supplies	\$368,642	0.20%	\$385,385	0.17%	\$88	\$85	-0.18%	81
Reading Materials	\$1,952,027	1.08%	\$2,117,786	0.99%	\$457	\$494	1.70%	88
Sports & Recreation	\$4,118,767	2.28%	\$4,880,452	2.29%	\$964	\$1,139	3.70%	64
Sports Equipment	\$2,394,144	1.32%	\$2,716,888	1.27%	\$560	\$634	2.70%	65
Travel Expenses	\$5,242,322	2.90%	\$6,056,105	2.84%	\$1,227	\$1,413	3.10%	75
TV, Radio, & Sound Equipment	\$7,211,297	3.99%	\$9,088,375	4.26%	\$1,688	\$2,121	5.21%	84
TRANSPORTATION & AUTO EXPENSES								
	\$31,098,275	17.21%	\$38,793,487	18.18%	\$7,280	\$9,053	4.95%	77
Automotive Maintenance/Repair/Other	\$6,423,522	3.55%	\$7,763,152	3.64%	\$1,504	\$1,812	4.17%	80
Gasoline	\$7,837,320	4.34%	\$10,156,459	4.76%	\$1,835	\$2,370	5.92%	84
Diesel Fuel	\$43,761	0.02%	\$50,477	0.02%	\$10	\$12	3.07%	64
Vehicle Purchases & Leases	\$10,277,512	9.01%	\$20,157,099	9.45%	\$3,810	\$4,704	4.77%	79
New Automobiles/Trucks/Vans	\$11,037,784	6.11%	\$13,250,437	6.21%	\$2,584	\$3,062	4.01%	87
Used Vehicles	\$5,239,728	2.90%	\$6,907,262	3.24%	\$1,227	\$1,612	6.36%	67
Rented Vehicles	\$313,545	0.17%	\$401,384	0.19%	\$73	\$94	5.60%	34
Towing Charges	\$27,026	0.01%	\$36,753	0.02%	\$8	\$9	7.20%	77
Boats/Outboard Motor, Etc.	\$175,589	0.10%	\$227,563	0.11%	\$41	\$53	5.92%	14
TOTAL APPAREL								
	\$15,532,854	8.59%	\$17,459,919	8.18%	\$3,636	\$4,075	2.48%	78
Women's Apparel	\$3,837,847	2.12%	\$4,104,664	1.92%	\$898	\$958	1.39%	69
Men's Apparel	\$3,247,651	1.80%	\$3,538,112	1.66%	\$760	\$826	1.79%	82
Girl's Apparel	\$1,074,435	0.59%	\$1,139,889	0.53%	\$252	\$266	1.22%	82
Boy's Apparel	\$886,510	0.49%	\$985,392	0.46%	\$208	\$230	2.23%	86
Infant's Apparel	\$413,839	0.23%	\$426,498	0.20%	\$97	\$100	0.61%	87
Footwear (Excluding Infants)	\$1,585,537	0.88%	\$1,738,097	0.81%	\$371	\$406	1.92%	75
Other Apparel Products & Services	\$4,487,035	2.48%	\$5,527,267	2.59%	\$1,050	\$1,290	4.64%	81

Data Source: Claritas 2008
Prepared on 9-24-2009
Lancaster County Planning Commission

**Table 2: Columbia Borough Retail Market Power
Opportunity Gap Report**

	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$80,191,607	\$75,925,868
Motor Vehicle and Parts Dealers-441	\$26,897,908	\$7,958,781	\$18,739,127
Automotive Dealers-4411	\$22,957,253	\$5,277,500	\$17,679,753
Other Motor Vehicle Dealers-4412	\$1,596,889	\$1,485,390	\$111,479
Auto Parts/Accessories, Tire Stores-4413	\$2,143,786	\$1,195,891	\$947,895
Furniture and Home Furnishings Stores-442	\$3,455,747	\$109,393	\$3,346,354
Furniture Stores-4421	\$1,909,834	\$0	\$1,909,834
Home Furnishing Stores-4422	\$1,545,913	\$109,393	\$1,436,520
Electronics and Appliances Stores-443	\$3,326,116	\$0	\$3,326,116
Appliances, Televisions, Electronics Stores-44311	\$2,537,766	\$0	\$2,537,766
Household Appliances Stores-443111	\$579,382	\$0	\$579,382
Radio, Television, Electronics Stores-443112	\$1,958,384	\$0	\$1,958,384
Computer and Software Stores-44312	\$652,901	\$0	\$652,901
Camera and Photographic Equipment Stores-44313	\$135,449	\$0	\$135,449
Building Material and Garden Equipment Stores-444	\$15,744,499	\$0	\$15,744,499
Building Material and Supply Dealers-4441	\$14,465,452	\$0	\$14,465,452
Home Centers-44411	\$5,733,335	\$0	\$5,733,335
Paint and Wallpaper Stores-44412	\$304,179	\$0	\$304,179
Hardware Stores-44413	\$1,180,167	\$0	\$1,180,167
Other Building Materials Dealers-44419	\$7,247,771	\$0	\$7,247,771
Building Materials, Lumberyards-444191	\$2,473,216	\$0	\$2,473,216
Lawn/Garden Equipment, Supplies Stores-4442	\$1,279,047	\$0	\$1,279,047
Outdoor Power Equipment Stores-44421	\$201,164	\$0	\$201,164
Nursery and Garden Centers-44422	\$1,077,883	\$0	\$1,077,883
Food and Beverage Stores-445	\$21,356,858	\$15,850,628	\$5,506,230
Grocery Stores-4451	\$19,478,349	\$13,235,256	\$6,243,093
Supermarket, Grocery Excluding Convenience Stores-44511	\$18,443,120	\$12,656,564	\$5,786,556
Convenience Stores-44512	\$1,035,229	\$578,692	\$456,537
Specialty Food Stores-4452	\$623,913	\$51,031	\$572,882
Beer, Wine and Liquor Stores-4453	\$1,254,596	\$2,564,341	(\$1,309,745)
Health and Personal Care Stores-446	\$7,777,379	\$31,105,951	(\$23,328,572)
Pharmacies and Drug Stores-44611	\$6,774,054	\$31,105,951	(\$24,331,897)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$259,933	\$0	\$259,933
Optical Goods Stores-44613	\$266,442	\$0	\$266,442
Other Health and Personal Care Stores-44619	\$476,950	\$0	\$476,950
Gasoline Stations-447	\$18,435,658	\$6,886,917	\$11,548,741
Gasoline Stations with Convenience Stores-44711	\$14,061,042	\$4,157,274	\$9,903,768
Other Gasoline Stations-44719	\$4,374,616	\$2,729,643	\$1,644,973
Clothing & Clothing Accessories Stores-448	\$6,417,835	\$942,868	\$5,474,967
Clothing Stores-4481	\$4,710,700	\$942,868	\$3,767,832
Men's Clothing Stores-44811	\$335,647	\$780,258	(\$444,611)

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Prepared on 9-24-2009
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Table 2: Columbia Borough Retail Market Power
Opportunity Gap Report

	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Women's Clothing Stores-44812	\$1,110,775	\$162,610	\$948,165
Children's, Infants' Clothing Stores-44813	\$294,927	\$0	\$294,927
Family Clothing Stores-44814	\$2,575,421	\$0	\$2,575,421
Clothing Accessories Stores-44815	\$98,958	\$0	\$98,958
Other Clothing Stores-44819	\$294,972	\$0	\$294,972
Shoe Stores-4482	\$864,903	\$0	\$864,903
Jewelry, Luggage, Leather Goods Stores-4483	\$842,232	\$0	\$842,232
Jewelry Stores-44831	\$774,275	\$0	\$774,275
Luggage and Leather Goods Stores-44832	\$67,957	\$0	\$67,957
 Sporting Goods, Hobby, Book, Music Stores-451	 \$2,324,556	 \$1,471,284	 \$853,272
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$1,605,801	\$863,239	\$742,562
Sporting Goods Stores-45111	\$761,237	\$334,213	\$427,024
Hobby, Toys & Games Stores-45112	\$555,149	\$0	\$555,149
Sew/Needlework/Piece Goods Stores-45113	\$127,853	\$0	\$127,853
Musical Instrument and Supplies Stores-45114	\$161,562	\$529,026	(\$367,464)
Book, Periodical and Music Stores-4512	\$718,755	\$608,045	\$110,710
Book Stores and News Dealers-45121	\$480,282	\$608,045	(\$127,763)
Book Stores-451211	\$444,088	\$0	\$444,088
News Dealers & Newsstands-451212	\$36,194	\$608,045	(\$571,851)
Prerecorded Tapes, CDs, Record Stores-45122	\$238,473	\$0	\$238,473
 General Merchandise Stores-452	 \$18,617,428	 \$1,417,245	 \$17,200,183
Department Stores Excluding Leased Departments-4521	\$8,333,790	\$0	\$8,333,790
Other General Merchandise Stores-4529	\$10,283,638	\$1,417,245	\$8,866,393
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$0	\$8,965,055
All Other General Merchandise Stores-45299	\$1,318,583	\$1,417,245	(\$98,662)
 Miscellaneous Store Retailers-453	 \$3,999,212	 \$3,196,613	 \$802,599
Florists-4531	\$269,186	\$467,733	(\$198,547)
Office Supplies, Stationery, Gift Stores-4532	\$1,566,326	\$320,854	\$1,245,472
Office Supplies, Stationery Stores-45321	\$891,445	\$0	\$891,445
Gift, Novelty and Souvenir Stores-45322	\$674,881	\$320,854	\$354,027
Used Merchandise Stores-4533	\$310,571	\$669,207	(\$358,636)
Other Miscellaneous Store Retailers-4539	\$1,853,129	\$1,738,819	\$114,310
 Non-Store Retailers-454	 \$11,600,568	 \$0	 \$11,600,568
Electronic Shopping, Mail-Order Houses-4541	\$6,317,629	\$0	\$6,317,629
Vending Machine Operators-4542	\$449,726	\$0	\$449,726
Direct Selling Establishments-4543	\$4,833,213	\$0	\$4,833,213
 Foodservice and Drinking Places-722	 \$16,363,711	 \$11,251,927	 \$5,111,784
Full-Service Restaurants-7221	\$7,526,136	\$451,416	\$7,074,720
Limited Service Eating Places-7222	\$6,696,014	\$3,552,936	\$3,143,078
Special Foodservices-7223	\$1,366,812	\$6,574,899	(\$5,208,087)
Drinking Places Alcoholic Beverages-7224	\$774,749	\$672,676	\$102,073

Data Source: Claritas 2008
Prepared on 9-24-2009
Lancaster County Planning Commission

Retail Charts: Data Definitions

Retail Market Power compares supply and demand to determine potential sources of revenue growth at any standard or user defined geographic area. Such comparison can be achieved at the retail outlet level or the merchandise line level.

Demand equals the total amount of dollars expended by residents for a given commodity.

Supply equals the amount of actual spending for a given commodity. This amount represents the satisfied percentage of demand.

Opportunity Gap equals or occurs when household expenditure levels for a specific geography are higher than the corresponding retail sales estimates. This difference signifies that resident households are meeting the available supply and supplementing their additional demand potential by going outside of their own geography (*figures without parenthesis*). The opposite is true in the event of an opportunity surplus (*figures with parenthesis*); when the levels of household expenditures are lower than the retail sales estimates. In this case, local retailers are attracting residents of other areas into their stores.

This element of the Strategic Economic Development Plan focuses only on the retail market within and outside of the Borough. It is for this reason that it is described as an assessment rather than an analysis that would include other fields for a more comprehensive overview. In the initial pages of this segment, buying power within the community has been highlighted. The following is an examination of some of the economic fields wherein the Borough can direct their efforts toward strengthening identifiable supply gaps. The datum, entitled Retail Market Power, located in the appendices, presents comparative statistics within an identified study area shown on the map entitled Columbia and Adjacent Study Areas.

The study area has been determined based upon two criteria, a drive time not exceeding 40 minutes and a radius of 30 miles. Together, each provides the Borough with a logical framework for comparative data from municipalities located within a short distance. This allows for evaluation of different categorical fields of the market to determine the most advantageous areas to pursue for economic restructuring. Three cities and four Boroughs of the study area present an interesting array of market details. Although the population base is greatly varied between the cities and Boroughs, the Borough will be able to derive sound conclusions that will result in future investments.

For example, the Opportunity Gap Report indicates that the Borough is deficient in three major retail areas: Electronics and Appliance Stores, Building Material and Garden Equipment, and Clothing and Clothing Accessories Stores. The comparative data indicates that all of the study area communities perform better than Columbia with the exception of Mount Joy Borough. If a corrective assumption is to be made, the indicated market shortfalls provide at least a minimal starting point for viewing other avenues for future commerce. The remaining categorical data from other retail areas of comparative sources, although not as severe, should be evaluated to enable an improved the economic climate.

The comparative data presented under the Demand Growth Report indicate favorable economic trends from years 2008 through 2010. The upward forecasts boast gains in nearly all categorical fields throughout the identified market area. Consequently, the datum from the Opportunity Gap and Demand Growth Reports should be cross referenced when in the process of determining what future actions may yield the greatest benefit in revitalizing the Borough's economy. Both reports are in the appendices.



Buying power within the community is unquestionably an essential factor in a community's effort to revitalize and restructure the local economy. The Borough's recovery plan focuses on three interrelated areas that have the potential to impact all aspects of municipal life. It is the intent of the strategic plan to create a realistic guide map to recapturing local spending resources accompanied with the buying power outside the Borough. The meld of the Downtown, Historic and River Districts is the most formidable avenue to the prosperity once enjoyed.

As part of the Strategic Economic Development plan an analysis of the core business district was conducted during the summer of 2008. This walking survey, undertaken by the Lancaster County Planning staff, defined the district as Locust from Front to Fifth Streets. The area also includes Third and Fourth Streets from H to I Avenues. The survey revealed 190 parcels of diverse uses ranging from residential, institutional, commercial and industrial. All of the downtown is synonymous with the historic district wherein history, architecture and commerce are a positive common denominator. Locust Street, the core business center of the Borough, predominated by commercial uses interspersed with mixed use buildings is also a major vehicular corridor.



The challenge that faces the Borough in the Downtown Business District is to create a new image when considering that the vitality of the area has greatly diminished over recent years. Creating a new image requires filling empty store fronts with varied business ventures that will attract both residents and visitors,

undertake rehabilitation, façade treatment reflecting period restoration and employ streetscape amenities. Each of these actions represents an integral part of the recovery plan. Most important is the Borough view of the opportunity gap data in an effort to attract business ventures or commercial venues that will be of interest locally, as well as, within the identified market area.

Additionally, parking has been an ongoing discussion regarding the lack of sufficient spaces to meet current demands, particularly around the Market House. The Borough does have plans to expand parking in the lot adjacent to the Market which should address an immediate need; however, when considering the full potential of customer/visitor interests the discussion of open lot parking may become more pronounced.

The Market House is and has been the centerpiece for all activities in the Downtown Business District. The location of this building within both the Downtown Business and Historic Districts affords a place of interest to all and has been a substantial building block for other businesses ventures. Golden Stories,

formerly known as Tastes of Styles Restaurant, located on Locust Street, is a prime example of a stand holder that graduated into a complete business venture. Also interesting about this location is its history as the site of Watt & Shand Department Store that was also located in Lancaster. The décor of the restaurant's lower level is enhanced by the exposed stone foundation walls of the building. The apparent mix of past and present should serve as a standard to be incorporated in the reuse of other buildings in the downtown.



The historic community character of the Borough is one of its principle assets. The preservation and enhancement of community character should play an important role in planning and revitalization efforts in downtown Columbia. The rich diversity of the Borough's history is still very evident in the Borough through a surprisingly intact collection of old and historic buildings and neighborhoods. As other municipalities increasingly lose this vital link with the social and cultural forces that shaped them, Columbia's traditional community character is increasingly becoming an asset that can and should be used to promote economic vitality.

Both the Historic and Downtown Business Districts are nearly indistinguishable due to the harmonious transition of period architecture from block to block and neighborhood to neighborhood. Future actions should be aimed at harnessing this asset by fostering enhanced improvements throughout the community. Marietta Borough, whose developmental history is linked to Columbia, has been successful in attracting visitors by marketing their historic heritage. Columbia's treasured resources can enable and surpass the efforts of her sister Borough by championing their physical and built environment.

The River District, one could argue, is the Borough's most treasured resource since its history is unquestionably aligned with its location along the Susquehanna River. This precious waterway was the primary source of the early local economy that emanated from travel to the movement of goods and services. It enabled the early business district that existed along Front Street. Today the community returns to the river as an integral part of the Borough economic recovery plan providing an all important attraction through eco-tourism that to date has been promoted on limited scale. The future plans for the River District will extend its natural influence into the Downtown Business and Historic Districts.



Three distinct districts form the solid foundation for the Borough's Strategic Economic Development Plan. The success of one is intrinsically linked to the success of all and ultimately the remainder of the Borough. The meld between the river to the downtown business and historic districts is a natural blend. In determining the development and implementation of future action plans, the Borough must incorporate all aspects of the economic data included within this report. The harmonious transition from district to district can be achieved by undertaking strategic physical enhancements, introducing .programmatic and marketing policies and securing community support.



FOCUS AREA: DOWNTOWN BUSINESS DISTRICT

Downtown Columbia comprises a recognizable portion of the historic district. During the early years, the location of the business corridor was determined by the commerce that emanated from the river as a transit route for people and the transport of industrial products. Front Street during this era was the major commercial and business corridor; however, the advent of the railroad replaced the river as a means of transport and channelized the economic and physical transformation of Locust Street as it exists today.



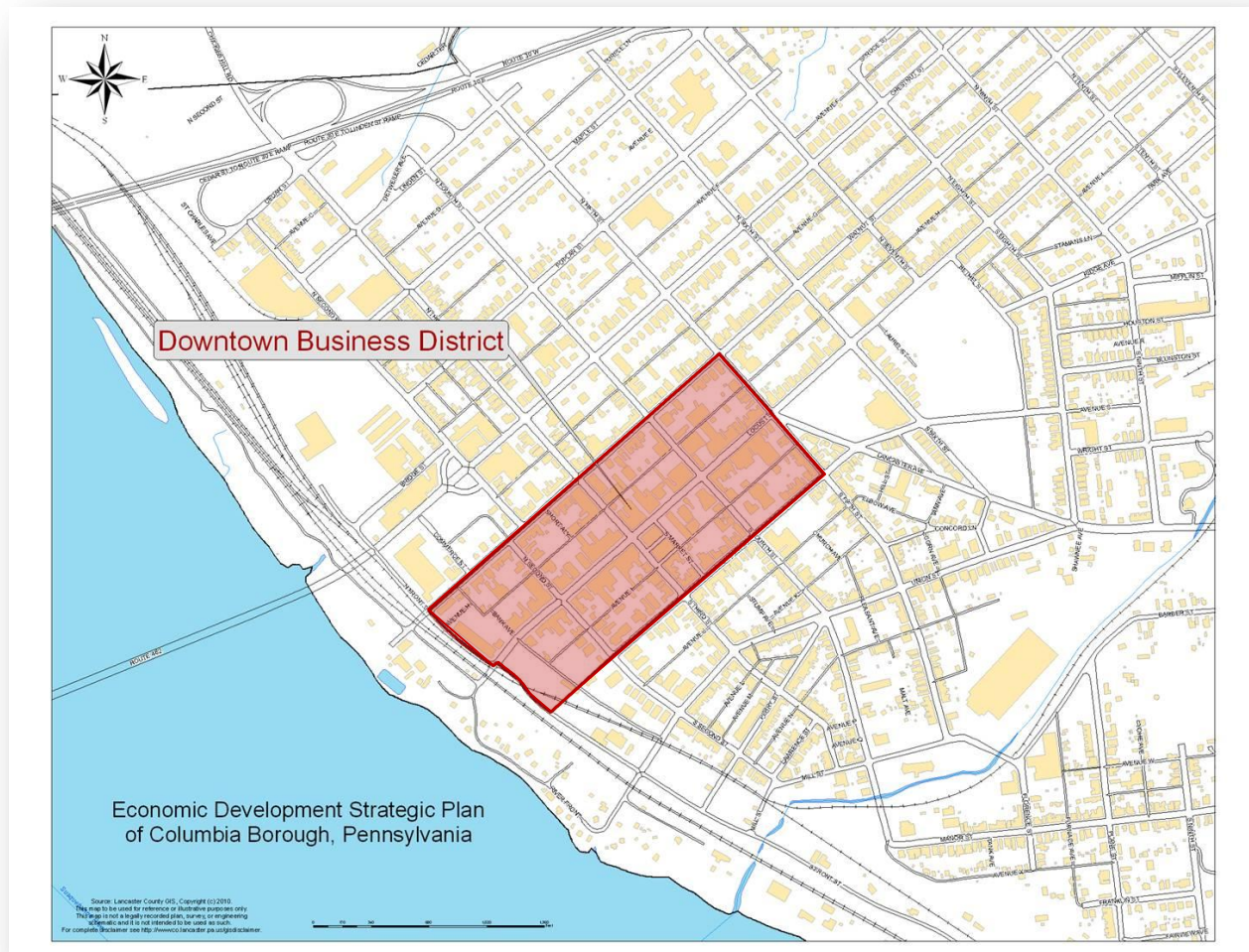
This once prosperous district, characterized by a thriving Market House as a centerpiece for the community complemented by multiple shops and businesses, has gradually declined relative to industrial and commercial displacements to other municipalities. In order to restore the growth and prosperity experienced in the past, the Borough must realign the historic downtown area with the river as an economic force. Complete restoration of the market, façade treatment to structures, the provision of adequate parking and an improved sightline to the river are positive goals that should be addressed. The melding of the river, historic and downtown districts will establish the formidable economic force that can lead to community revitalization.

DOWNTOWN BUSINESS DISTRICT: MISSION STATEMENT

Restore and expand the Borough's economic vitality by utilizing a market based assessment of the community.

DOWNTOWN BUSINESS DISTRICT: GEOGRAPHIC BOUNDARIES

- North from Locust Street to Walnut Street
- South from Locust Street to Cherry Street
- East from 3rd and Locust Street to 5th and Locust
- West from 3rd and Locust to Front and Locust Street



DOWNTOWN BUSINESS DISTRICT: ECONOMIC HISTORY

While the Riverfront was Columbia's first commercial area it was primarily focused on people passing through town. As the town's population grew, so did the need for commercial enterprises whose focus was more on local residents. The area that became Columbia's commercial heart was Locust Street from Front (in the Riverfront) and extending four blocks east to Fifth Street and Lancaster Avenue. Each of the numbered streets to Fourth extending one block north to Walnut and one block south to Cherry were also in this classic downtown of 12 linear blocks of about equal length.

Just before the United States entered World War I, Columbia had what many people still consider to be a classic small town downtown.

- Every block of Locust Street in the downtown had one bank. These were local banks with names such as First National, Columbia National, Central National, and Columbia Trust. Bankers and tellers knew and were often neighbors of people they were loaning money to and receiving deposits from.
- There were department stores with Watt & Shand of Lancaster having a branch on Locust Street. Frank W. Woolworth had one of his 5 and 10¢ stores on Locust.
- The town's present Market House has been on South Third Street since 1869 where residents can buy fresh meat, produce and homemade goodies several times a week.
- At Third and Locust Streets, the town-owned Opera House featured entertainment such as vaudeville, plays, and movies. The Opera House also had Borough offices and shops in it. The State and Alto movie theaters and, for a short while, the Happy Hour movie theater were all located along Locust Street as well as three druggists, Zeamer's, Hinkle's, and Bucher's.
- The U. S. Post Office was always in the downtown, being first located at Second and Locust in the Odd Fellows' Hall and later at its present location at Fourth and Walnut Streets. Many fraternal organizations met downtown either in their own building (as the Moose and Foresters do today) or on the upper floor in some of the larger buildings such as Columbia Trust or Bucher Buildings. Also on upper floors of these larger buildings were offices of dentists, attorneys, and other professionals. Signs in gold leaf lettering would appear on their windows.



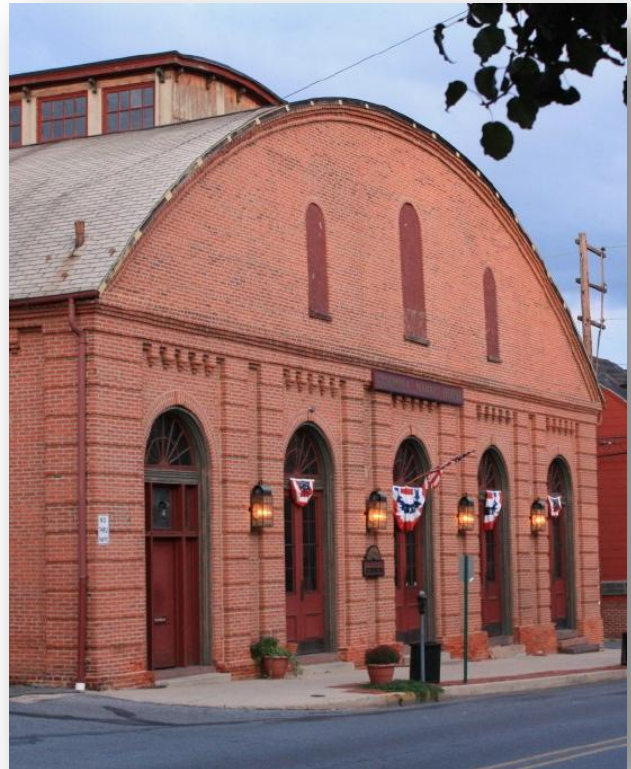
- Both short- and long-term lodging were available at numerous downtown hotels. The Central Hotel was at 313-315 Locust Street and Hotel Columbia was at 309 Locust Street; both were multi-story. Two blocks west on Locust was the Franklin House. Bittner's Hotel was at Fourth and Walnut.
- The two main local newspapers, the *Columbia News* and the *Columbia Spy*, each had an office on Locust, as did the Columbia Water Company.
- Clothing stores were Eichhorn's, Desher Brothers, and Isaac A. Fuld, all on Locust Street.
- Interspersed with all of these were many smaller family owned and run businesses - groceries, barbers, confectioners, dressmakers, photographers, funeral directors, cigar stores, shoe stores, hardware stores, tea and coffee companies, ice cream shops, jewelers, watchmakers, furniture stores, and restaurants.
- Many churches were and still are located in the downtown.
- Commuting, in today's context, was virtually non-existent. Business owners either lived above their shop and walked down the stairs or lived nearby and walked to work. Those living on the outer edges of town could take the trolley that ran up the center of Locust from Second and across both Second and Fourth Streets.
- What changed downtown? Primarily two economic forces were the causes. First, the Great Depression, which caused many weaker businesses to close. Then after World War II, the increase in reliable and fast automobiles and the interstates gave rise to long distance commuting, strip malls, shopping centers, and big box stores. But the automobile also brought about the day tourist, vacationer, and historic tourism and downtowns like Columbia's are noting and making them important ingredients in



DOWNTOWN BUSINESS DISTRICT: ASSETS

The Downtown Business District contributes the following assets to Columbia Borough's Economic Strategy Footprint:

- Numerous structures that retain their original architectural character
- Contains a major corridor leading to the nearby Susquehanna River
- Contains the Market House which is a centerpiece for economic and social interaction
- The Market House is place of destination for visitors
- The Market House is one of the few remaining historic, nineteenth-century indoor markets
- Trade area drive shed of 30 minutes includes Lancaster, York and Harrisburg Cities and parts of each respective County
- Interrelationship between the River and Historic Districts
- Ability to provide sufficient parking
- Complimentary relationship between the building and the street
- Designated Local Economic Revitalization Tax Abatement (LERTA) area



DOWNTOWN BUSINESS DISTRICT: ACTION PLAN

The Downtown Business District plans to become more business- and consumer-friendly through actions such as:

- improvements to parking and transportation options,
- enhancements to safety and security,
- creation of economic incentives for new businesses, and
- expansion of opportunities for pedestrian traffic in the region.

FOCUS AREA: HISTORIC DISTRICT

Columbia's Strategic Economic Plan is anchored by three districts that form the solid foundation toward achieving community prosperity and wellness. History, as one of the anchors, can and should be considered the major support beam that gives strength as the melding factor to enable a cohesive economic strategy. The Columbia Historic District includes approximately 950 structures which incorporates one third of the Borough area and architectural styles ranging from Eighteenth Century Traditional, to Queen Anne and Twentieth Century Art Deco.

Today, row upon row of houses with characteristic façades of Greek Revival, Italianate, Mansardic or Colonial Revival stand without interruption or intrusion. These are the characteristics that the Borough must secure, maintain, and enhance for the community's financial well-being and to foster appreciation for Columbia's history. The Borough will lead the charge to determine how to make the existing built environment work for Columbia.

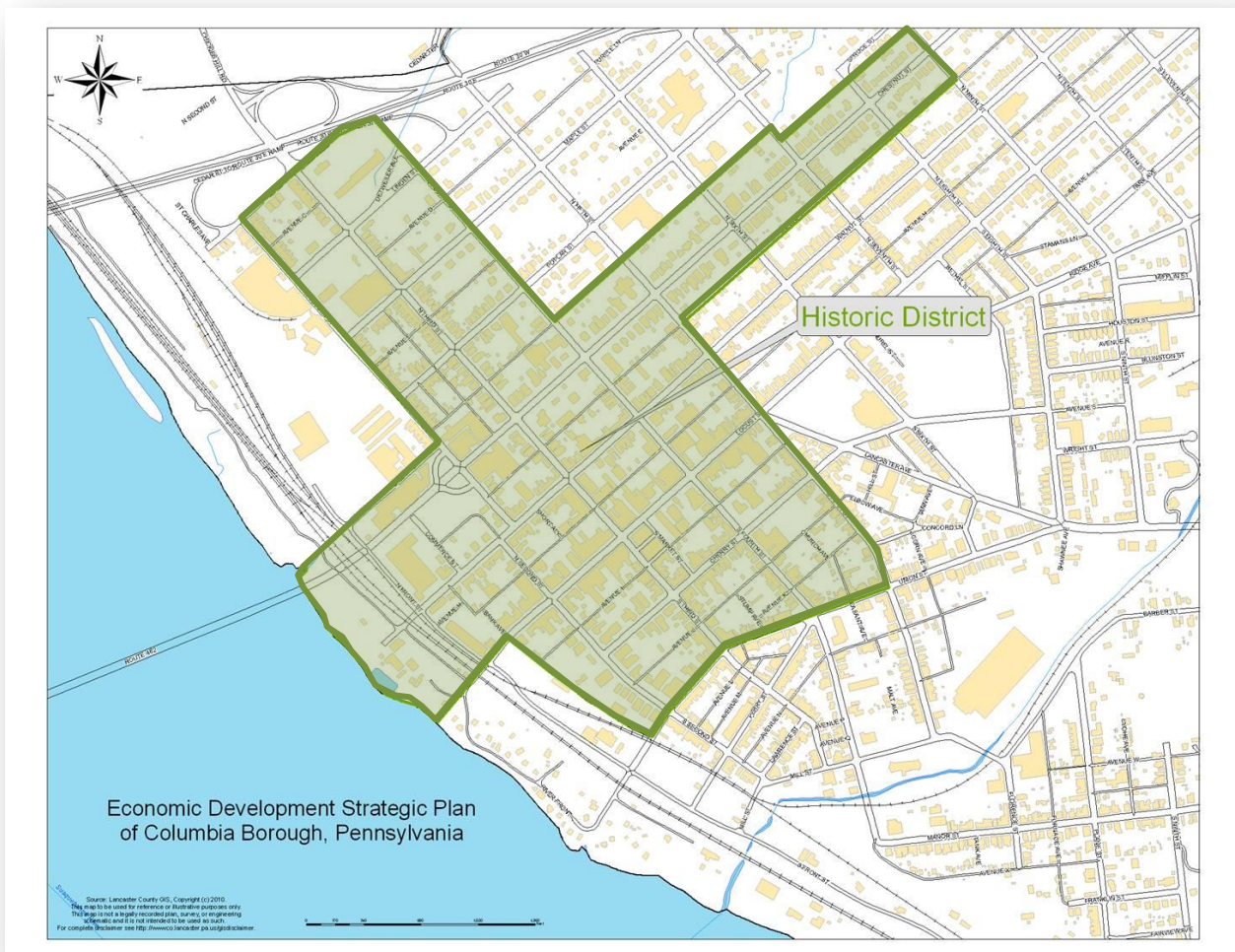


HISTORIC DISTRICT: MISSION STATEMENT

Enhance and promote the Borough's historical assets as a key element in our economic recovery plan.

HISTORIC DISTRICT: GEOGRAPHIC BOUNDARIES

- North from Locust Street to Cedar Street between Second and Fourth Streets
- South from Locust Street to Union Street between Bank Avenue and Fifth Streets
- East from Chestnut and Fifth Streets to Ninth Street between Avenue F and Avenue G,
- West on Locust and Fifth Streets to the Susquehanna River edge between Bridge and Locust Streets



HISTORIC DISTRICT: ECONOMIC HISTORY

Columbia's Historic District encompasses some of Riverfront and all of the Downtown Business District. In terms of well-known revitalization methods one could look at the Historic District playing the role of "Elm Street" and Downtown playing "Main Street."

The Historic District had its start in the registration of the Columbia Historic District on the U.S. department of the Interior's National Park Service's National Register of Historic Places on May 6, 1983. Columbia's Historic District is Item Number 83002249 in the NRIS (National Register Information System). The District's area is described as "Roughly bounded by Susquehanna River, Union, Cedar, 4th, and 5th Sts., Chestnut to 9th St." Some of the text describing the Columbia Historic District can be found on the web at www.livingplaces.com/PA/Lancaster_County/Columbia_Borough/Columbia_Historic_District.html. Columbia Borough Council adopted this as "Borough of Columbia Historic District Ordinance" on May 13, 2002.

- Homes range from small row homes to large stand-alone Victorian homes. Residents, until after World War II, typically would work in businesses or industries along the Riverfront, Downtown or within the Historic District itself.
- Until 1938, by walking no more than two blocks from any place in the Historic District, residents could catch a trolley to Chickies Park, Marietta, or Lancaster. Even after the trolley tracks were torn up, the replacement buses continued on the same route as they do today. Residents could ride the trolley or walk to the Pennsylvania Railroad station at Front and Walnut Streets. There, as late as 1954, they could catch the train or Doodlebug to Lancaster or York and make connections to the PRR's fleet of passenger trains headed to New York, Philadelphia, Washington, D.C., Chicago, and St. Louis and the rest of the country's rail network.
- Within the Historic District there were major industries with some covering up to a square block. They made kitchen stoves, silk fabric, pretzels, potato chips, garments, neon lighting, iron castings, locks, umbrellas, machine tools, and industrial laundry equipment.
- Although somewhat surprising today, horse dealers, blacksmiths, and dealers in hides, pelts, and tallow were important to the early community.





- Today the area includes several light industries and one that makes brass and bronze castings.

- Service industries included classic corner groceries spread throughout, candy stores, barbers, markets, butchers, a brewery, taverns, bakers, coal dealers, and ice dealers.

The Historic District is an example of a livable community and plays important roles as a place to live for its residents, local customers and users of the other two Districts, and in providing destinations for visitors.

HISTORIC DISTRICT: ASSETS

The Historic District contributes the following assets to Columbia Borough's Economic Strategy Footprint:

- The abundance of architectural styles of historic significance
- A major corridor leading to the River
- Interrelationship and meld of the River and Downtown Business Districts
- The Historic District includes all of the Downtown Business District and portion of the River District
- Potential to attract visitors interested in structures of architectural significance
- Complementary relationship between the buildings and the street



HISTORIC DISTRICT: ACTION PLAN

The Historic District will capitalize on the rich history of Columbia through actions such as:

- development of the physical attributes of the historic area,
- maintenance of period architecture complimented by streetscape and scale,
- creation of historic programming, and
- expansion of opportunities for foot traffic in the region.

FOCUS AREA: RIVERFRONT DISTRICT

The origin of Columbia Borough is directly linked to its strategic location along the Lower Susquehanna River. Historically, it is unquestioned that the economic life line of the community emanated from the river beginning with the Wright's Ferry to the canals that provided support to the iron ore furnaces that dotted the shore from Columbia to Marietta, while the water course energized the mills during the Industrial Revolution, as well as, producing the steam needed by the railroads to transport a variety of locally produced products. The thriving river based economy catalyzed growth in both the commercial and residential segments of the community.



These past inter-relationships highlight and give credence to the basis for the footprint identified in developing this economic growth strategy. As history has evidenced technological advances, the role of the river diminished as a contributory economic force. Today another era of great potential has emerged that reemphasizes the river as a natural resource and for recreational purposes rather than industry. The focus of the committee is to identify those assets that will interact and springboard related activities into an economic resurgence throughout the community.

RIVERFRONT DISTRICT: MISSION STATEMENT

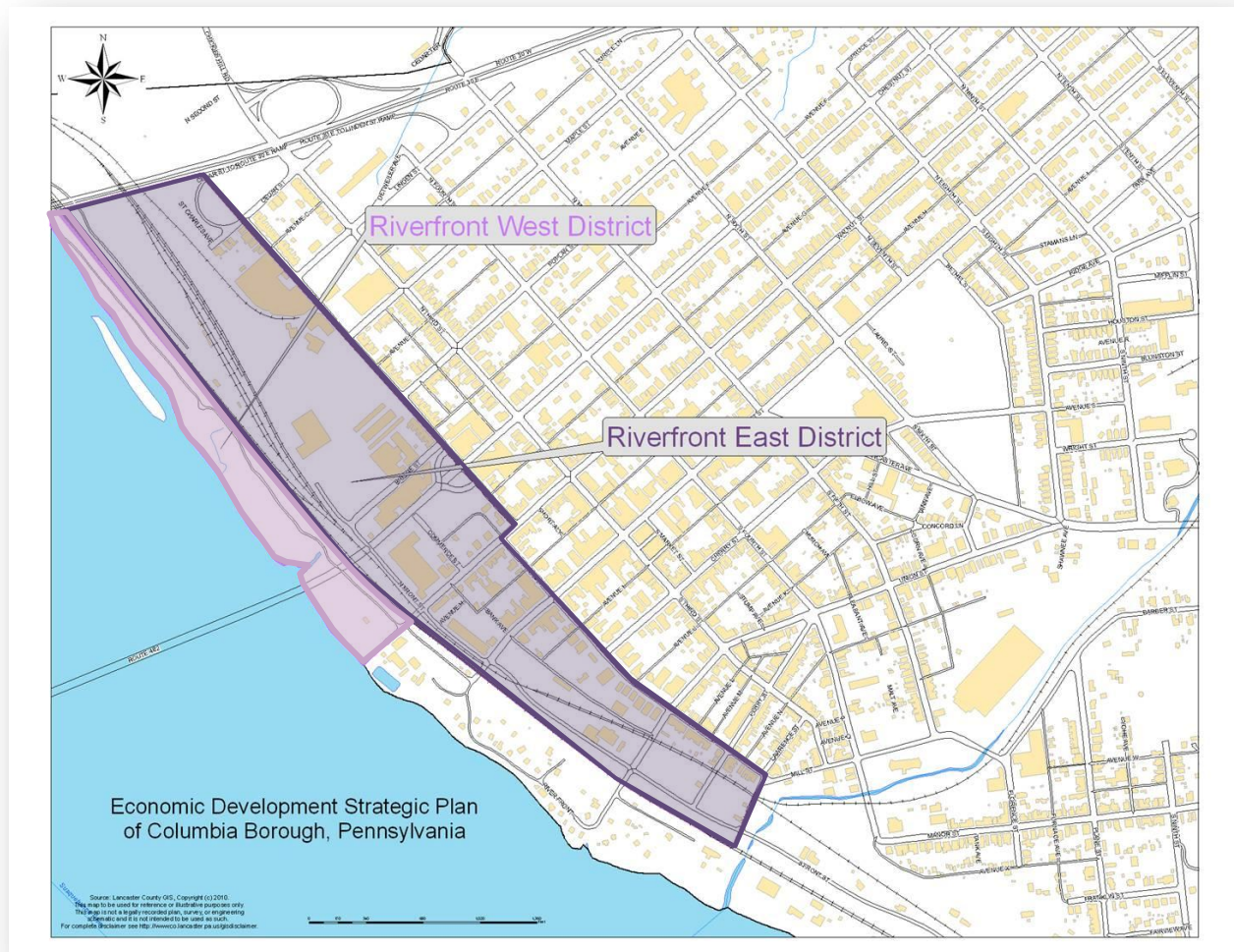
Restore and expand the Borough's natural asset as key element of the economic development plan.

FRONT DISTRICT: GEOGRAPHIC BOUNDARIES

RIVERFRONT DISTRICT: GEOGRAPHIC BOUNDARIES

Route 30 to Walnut Street West of the Railroad tracks

Route 30 to Mill Street East of the Railroad tracks



RIVERFRONT DISTRICT: ECONOMIC HISTORY

When you face the lower Susquehanna River's topology and study it, as early Pennsylvania settlers did, you quickly conclude that the easiest crossing between Harrisburg and the river's mouth is at Columbia. Upstream and downstream rugged hills on either or both sides make approaching the river difficult, but east and west of Columbia the hills are much gentler going to Lancaster and York respectively.

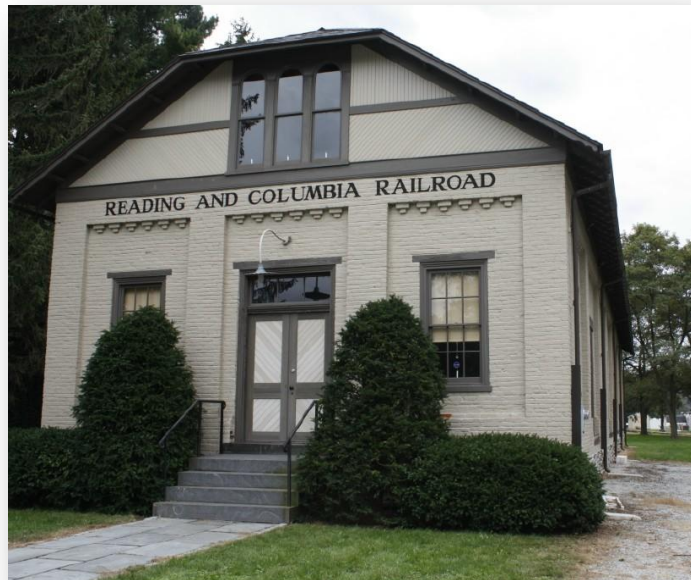


So it was only natural in 1730 that John Wright, Sr., Quaker preacher and first European settler in the area, obtained a patent (or exclusive right) for a ferry across the river at this point, which had the name of Wright's Ferry. People waiting for the ferry would need places to stay, drink, and eat so inns and taverns arose near the river shore. The river is not navigable by regular ships, but entrepreneurs could float logs and rafts downstream to tidewater markets. Wright's Ferry was a logical waypoint on the route.

- In 1834 the Main Line of Public Works of Pennsylvania opened at Columbia (renamed from Wright's Ferry in 1788). To the west the Main Line was a canal and to the east it was the Philadelphia and Columbia Railroad.
- At Columbia passengers had to transfer from the railroad to canal. This process gave rise to more hotels and other businesses currently referred to as the service industry.
- The sudden growth of fast, relatively inexpensive transportation proved to be a magnet for other industry especially those that involved bulk quantities such as lumber, anthracite coal, and iron furnaces. Many of these located along the river shore.
- Freed African American Stephen Smith got his start by running his own lumberyard. He ultimately became one of the wealthiest blacks in his time.
- As a developing transportation hub, Columbia also had station on the underground railroads with many escaping slaves headed farther north or to Canada. However, some stayed and settled in Columbia or went east to Philadelphia in box cars with false ends.
- Across the river, the Susquehanna & Tidewater Canal (S&T) ran to the Chesapeake Bay beginning in 1840.



- Because canals were limited by not being able to run in winter and then being prone to spring washouts, the railroads gradually expanded to complement the canals, but ultimately replaced them.
- The several lines that merged into the growing Pennsylvania Railroad extended upriver in 1850 towards Harrisburg, downstream to Perryville, Md., in 1877, and west to York. Columbia was a major PRR hub with two yards, repair shops, a 360-degree roundhouse, freight station, express building, passenger station, switching crews, and helper crews for engines to help push eastbound freight trains towards Mountville.
- The Reading & Columbia reached town during the Civil War and gained control of the S&T canal as a southern outlet for its anthracite coal. The railroad unloaded the coal from cars to canal boats at a wharf at the foot of Locust Street and towed them across to the S&T's entrance.
- Local commercial fishermen for shad, eel, and other river fish were once so numerous that there were local neighborhoods named "Fishtown" and "Shadtown."
- Around the beginning of the twentieth century, a gradual shift started along the riverfront away from industry and towards recreation. The canals closed and the PRR opened the Atglen & Susquehanna Branch, the Low Grade line that eliminated the need for many Columbia based helper crews.
- The PRR Athletic Association had a recreation area at the foot of Walnut Street with a refreshment building and a bandstand. In the summer there was even a PRR swimming barge with a sliding board in the river. This area grew into the existing River Park.
- With downstream dams cutting off migratory shad and eels, commercial fishing declined and was replaced with recreational fishing. Local people built cabins and a canoe club to enjoy additional aspects of the Susquehanna.
- Infrastructure that absolutely needed access to the river such as the Water Company and sewer plant remained or grew into fixtures on the shore. The remaining shore gradually focused on recreational activities.



RIVERFRONT DISTRICT: ASSETS

The River District contributes the following assets to Columbia Borough's Strategic Economic Footprint:

- Natural resource from which an economic base can be established through eco-tourism
- Nature areas along the river and scenic trails and outlooks
- The district's rich history in terms of the Borough's development, the Industrial Revolution and the Civil War
- Close proximity to the Chickies Creek Historical District
- A place of destination for visitors
- Interrelationship and meld between the Downtown Business and Historic Districts
- Prime recreational area



RIVERFRONT DISTRICT: ACTION PLAN

The Riverfront District will capitalize on the recreational and historical assets of the Susquehanna River through actions such as:

- expansion of recreational opportunities
- implementation of educational programming
- enhancements to safety and security
- improvements to parking and transportation options



ACTION PLAN MATRIX – HOW TO READ

THE ACTION PLAN MATRIX WAS DEVELOPED AS A PRACTICAL AND USEABLE LIST OF PROJECTS, PROGRAMS AND POLICY RECOMMENDATIONS IN THE FOLLOWING FIVE CATEGORIES:

- Projects / Development (P/D)
- Educational / Cultural Programming (E/C)
- Physical Improvements (PI)
- Administrative Actions (AA)
- Marketing / Promotion (M/P)

EACH CATEGORY HAS A TABLE OF ACTION ITEMS PROVIDING THE FOLLOWING INFORMATION:

- Type: The two letter category identifier (See above list)
- Activity: The common name/title of the project, program or policy recommendation
- District: The location of Action Item
 - D = Downtown District
 - H = Historic District
 - RE = Riverfront East
 - RW = Riverfront West
- Timeframe
 - The outlook for project implementation in years (0-3, 3-5, 5+, 10+)
 - PROJECTS UNDERWAY ARE HIGHLIGHTED IN YELLOW
 - PROJECTS COMPLETED ARE HIGHLIGHTED IN GREEN
- Lead & Support: The local, regional or state entity that is either leading and/or providing direct support to an Action Item.

LEAD / SUPPORT			
B&GC	BOYS & GIRLS CLUB	LC	LANCASTER COUNTY
CB	COLUMBIA BOROUGH	PA	PENNSYLVANIA
CBPC	COLUMBIA BOROUGH PLANNING COMMISSION	PENNDOT	PA DEPT. OF TRANSPORTATION
CBPD	COLUMBIA BOROUGH POLICE DEPARTMENT	PE	PRIVATE ENTERPRISE
CBSD	COLUMBIA BOROUGH SCHOOL DISTRICT	ROTARY	COLUMBIA ROTARY CLUB
CDDC	COLUMBIA DOWNTOWN DEVELOPMENT CORPORATION	RT	RIVER TOWNS
CEDC	COLUMBIA ECONOMIC DEVELOPMENT CORPORATION	SVCC	SUSQUEHANNA VALLEY CHAMBER OF COMMERCE
CHIPS	COLUMBIA HISTORIC PRESERVATION SOCIETY	WB	WRIGHTSVILLE BOROUGH
HARB	HISTORIC ARCHITECTURAL REVIEW BOARD	WHT	WEST HEMPFIELD TOWNSHIP
DISTRICT			
D	DOWNTOWN DISTRICT	RE	RIVERFRONT EAST DISTRICT
H	HISTORIC DISTRICT	RW	RIVERFRONT WEST DISTRICT

FURTHER INFORMATION ABOUT ACTION ITEMS ARE DENOTED BY THE FOLLOWING:

- * Projects Found in Columbia Borough Comprehensive Plan are marked with an asterisk

ACTION PLAN MATRIX

ACTION ITEMS: PROJECTS / DEVELOPMENT (P/D)

TYPE	ACTIVITY	DISTRICT	TIMEFRAME	LEAD	SUPPORT
P/D	Complete Boys & Girls Club Project	H	Completed	B&GC	
P/D	Complete Civil War Trail Project	H	Completed	RT	PA
P/D	Complete 4 th & Walnut Streets CDBG Project	H	Completed	CB	
P/D	Complete Market House Preservation Project*	D, H	Underway	CB	
P/D	Complete River Park Revitalization	RW	Underway	CB	
P/D	Implement State Route 441 Relocation Project	D, H	Underway	CB	
P/D	Coordinate PA462 Bridge Historic Lighting Project	H	Underway	RT	CB, WHT, WB, PennDOT
P/D	Complete 23-29 S. 3 rd Street Parking Project*	D	Underway	CB	
P/D	Complete 106 Locust Street Parking Project*	D, RE	Underway	CB	CBPC
P/D	Complete N. 2 nd Street CDBG Project	H	Underway	CB	
P/D	Facilitate 3 rd & Linden Streets Development	H	Underway	CEDC	PE, CB
P/D	Install Floating Docks	RW	Underway	CB	WHT
P/D	Participate in programs to encourage adaptive reuse of vacant properties	D, H	0-3	CB	CBPC, CDDC, CEDC, SVCC
P/D	Create and implement a parking plan*	D, H	0-3	CB	PE
P/D	Revitalize Rotary Park	H	0-3	RT	CB
P/D	Enhance Walnut Street Gateway	RE	0-3	CB	
P/D	Improve Safety, Landscape, and Walks at PA462 Bridge	RE	0-3	CB	RT
P/D	Provide River Park Amenities (café, pavilion, restrooms, etc.)	RW	3-5	CB	PE, CDDC, CEDC
P/D	Erect an Environmental Center	RW	3-5	CB	RT
P/D	Rehab State Theater (movies, performing arts, etc.)	H	3-5	CEDC	PE, CB
P/D	Complete a Feasibility Study for Creating a Civic Center	D	5+	CB	CDDC, CEDC
P/D	Complete a plan for new uses along Locust Street from 3 rd to 5 th (e.g., pedestrian mall, street cafes, etc.)	D	5+	CEDC	PE, CDDC, CB
P/D	Explore Market for Street Cafes	D	5+	CEDC	PE, CB, CDDC
P/D	Establish a Susquehanna River Museum of Culture/History	RE	5+	RT	CB, PE

TYPE	ACTIVITY	DISTRICT	TIMEFRAME	LEAD	SUPPORT
P/D	Acquire Pennsylvania RR Passenger Station	RE	5+	CB	PE
P/D	Re-Create the River Ferry	RW	5+	RT	PE
P/D	Provide an Area for Boat Repairs (Marina, Dry Dock)	RE	5+	CEDC	PE, CB
P/D	Explore Feasibility of an Entertainment Barge	RW	5+	PE	RT
P/D	Establish an Amphitheater for Entertainment	RW	10+	CB	
P/D	Construct Pedestrian Bridge over RR along PA462 Bridge	RE	10+	CB	
P/D	Re-Create a Canal Boat	RW	10+	PE	RT

ACTION ITEMS: EDUCATION / CULTURAL PROGRAMMING (E/C)

TYPE	ACTIVITY	DISTRICT	TIMEFRAME	LEAD	SUPPORT
E/C	Conduct Seminars at Market (Live Historic Workshops)	H	Underway	HARB	CB
E/C	Provide Arts/Theater Events	D	Underway	CDDC	PE, CEDC
E/C	Enhance Historical Society Activities	D, H	0-3	CHiPS	
E/C	Establish Self-Guided Walking Tours from Market House*	D	0-3	CDDC	CB, CEDC, CHiPS, SVCC
E/C	Increase Displays on River & Towns	RE	0-3	CHiPS	CB, CDDC, CEDC, SVCC
E/C	Install Educational Signage for Walking Tours of the River Park*	RW	0-3	CB	CDDC
E/C	Provide Educational Courses at the River Park	RW	0-3	CB	CBSD, PA
E/C	Increase Opportunities for Recreation	D	0-3	CB	CDDC, CEDC, PE
E/C	Create Educational Materials about the Historic District Ordinance	H	0-3	HARB	CB
E/C	Incorporate Columbia Borough History into CBSD Curriculum	H	0-3	CBSD	CHiPS
E/C	Complete Historic Resource Inventory (Catalog Architectural Photographs and Records)	H	0-3	LC	HARB
E/C	Educate Potential Investors on KOZ & LERTA Opportunities	D	0-3	CB	
E/C	Establish Historic Weekends Using Actors	H	3-5	CDDC	CHiPS, RT
E/C	Introduce Carriage Rides (Historic District)	H	3-5	CDDC	PE

ACTION ITEMS: PHYSICAL IMPROVEMENTS (PI)

TYPE	ACTIVITY	DISTRICT	TIMEFRAME	LEAD	SUPPORT
PI	Increase Walkability	D	Underway	CB	
PI	Improve Lighting	D	Underway	CB	
PI	Enhance Streetscape to better display Architecture	D	Underway	CB	CDDC
PI	Provide Adequate Parking for River Park Visitors	RW	Underway	CB	
PI	Install Cameras for Monitoring and Safety	RW	Underway	CB	CBPD
PI	Establish Columbia as Trailhead for Northwest Lancaster County Trail *	RW	Underway	CB	LC
PI	Identify Anchor Buildings for Targeted Downtown Redevelopment	D	0-3	CEDC	CB, CDDC, CHIPS
PI	Improve Maintenance of Streetscape*	D, H	0-3	CB	PE, CDDC, CEDC, Citizens
PI	Create Harmonious Transition among three Target Areas	D	0-3	CB	
PI	Establish Parking with County Parks (Chickies Rock)*	RE	0-3	CB	PE
PI	Create a Pedestrian Friendly Promenade along the River	RW	0-3	CB	
PI	Establish Façade Improvement / Preservation Program	H	0-3	CB	HARB
PI	Develop and Install Gateway and Directional Signage*	D, H, RE, RW	0-3	CB	CBPC
PI	Develop a Plan for Increased Porch Lighting	H	0-3	HARB	Citizens
PI	Improve Sidewalk Maintenance	H	0-3	CB	PE
PI	Provide Landscaping along Railroad Tracks	RE	3-5	CB	
PI	Install Period Lighting and Signs for Neighborhoods	H	5+	CB	CDDC
PI	Provide Areas for Camping and Recreation	RW, RE	5+	CB	PE
PI	Connect Rotary Park and River Park	RE	5+	CB	

ACTION ITEMS: ADMINISTRATIVE ACTIONS (AA)

TYPE	ACTIVITY	DISTRICT	TIMEFRAME	LEAD	SUPPORT
AA	Enact LERTA	D	Completed	CB	CBSD, LC
AA	Maintain KOZ	RE	Completed	CB	
AA	Reduce Truck Traffic in Downtown Area	D	Completed	CB	
AA	Work with Railroad to Acquire Riverfront between Bridges	RW	Underway	CB	
AA	Improve Code Enforcement	D	Underway	CB	CBPD, HARB
AA	Enforce HARB Requirements	H	Underway	CB	HARB
AA	Increase Owner-Occupied Dwelling Units	D	0-3	CB	
AA	Encourage Deconversion of smaller apartment units	D	0-3	CB	
AA	Pursue Traffic Calming Measures (25 MPH, etc.)	RE	0-3	CB	
AA	Cultivate Partnership with the Von Hess Foundation	H	0-3	CB	HARB
AA	Consider a Smaller Historic District Boundary	H	0-3	CB	HARB
AA	Review and Update HARB Ordinance	H	0-3	HARB	CB
AA	Review Zoning to ensure Mixed Use in Riverfront and Downtown Districts	D, RE, RW	0-3	CB	

ACTION ITEMS: MARKETING / PROMOTION (M/P)

TYPE	ACTIVITY	DISTRICT	TIMEFRAME	LEAD	SUPPORT
M/P	Develop a New Marketing Plan	D, H	0-3	CEDC	CB, CDDC, SVCC
M/P	Explore New Branding / Identification	D	0-3	CDDC	CB, CEDC, SVCC
M/P	Recruit Investors to Provide Goods/Services (Recreational)	RE	0-3	CEDC	CB, CDDC, PE, SVCC
M/P	Increase Coordination with Regional Tour Groups	H	0-3	SVCC	CB, CDDC, CEDC
M/P	Involved more Citizens in Beautification Group Efforts*	H	0-3	CDDC	PE, CEDC
M/P	Create a Cultural Tour Directory (Historic Homes and Businesses)	H	0-3	CDDC	PE, CEDC, CHIPS
M/P	Coordinate and Expand Hours of Historic Site Operations	H	0-3	CDDC	CB, CEDC, SVCC
M/P	Increase Variety of Available Businesses	D	0-3	CEDC	CDDC, CB, PE, SVCC
M/P	Establish Standard Business Hours	D	0-3	CDDC	PE, CB, CEDC, SVCC
M/P	Increase Nightlife Activity	D	3-5	CDDC	PE, CEDC
M/P	Open Historic Buildings for Uses in Addition to Tours	H	3-5	CDDC	PE, CB, CEDC
M/P	Recommend Additional Homes for National Register Designation	H	3-5	HARB	CB
M/P	Explore Feasibility of Tourist Trolley coming into Columbia	H	5+	CDDC	PE, RT

CONCLUSIONS

Columbia is well positioned to reestablish itself as a prosperous community, especially as it relates to its natural, historic and cultural heritage. The Borough's setting on the Susquehanna River is a tremendous asset and the genesis for the development of the Borough's rich character evidenced within both the historic and downtown districts. Throughout this document, the focal point has been an identifiable economic footprint comprised of three interrelated districts. Collectively, they form a robust alliance that will generate a broad range of activity that will impact and change the economic environment throughout the Borough.

Foremost and key to the success of the strategic plan will be the desire of the Borough citizenry to recognize and embrace the Borough as an outstanding place to live. The past three decades have evidenced severe changes on the urban landscape resulting in the diminishing role of urban centers for employment, education and as cultural hubs. Without question, this once vibrant community has experienced the same fate; however, as in many other communities where community foundations have been decimated, Columbia's has remained quietly unmoved. The purpose of this document is both to bring together the elements of the footprint, and to raise public awareness about Columbia's sustainable community assets.

Within the past five years, the downtown district has begun to show signs of progress in terms of new business ventures and the return of the Market House. The latter is by far the centerpiece of the community's economic recovery efforts, not only for the downtown district but for the Borough at large. It is anticipated that the market may become an additional information center that will guide and encourage both residents and visitors to discover all places of interests within the Borough and especially hallmark the rich architectural ambiance. The presence of recent antique shops characteristically complements both the downtown and historic districts whose boundaries are nearly inclusive.

In order to better assess the potential for commerce in the downtown, the strategic plan presents a market assessment that provides data on the buying power within Columbia's retail market. It is important that the Borough target and capture the available expendable resources from its residents. This focus is in concert with the community becoming more aware of its assets and disbursing expendable income within the Borough. The strategy also provides a primary market area based upon a radius of 30 miles and a drive time of 40 minutes. The identified geographic area includes three cities and four other Boroughs wherein comparative data for each community is also available. With the availability of this information, the Borough has a sound basis for pursuing various market ventures advantageous to the downtown and community at large. Specifically, the market assessment gives the Borough a birds-eye view of its primary market area.

What is unique about Columbia Borough is the universal scale of the buildings throughout the community that remains intact. The historic character of a community is an invaluable resource and marketable asset that cannot be duplicated. The Borough, in concert with their efforts to revitalize the commercial presence within the downtown, must give equal attention to the historic and architectural significance of all structures within and beyond the economic footprint. Historical preservation as an economic development tool must be fully recognized and employed for the purposes of tourism and the overall well being of the community. In order to both secure and enhance the value of history as detailed, Columbia must consider regulations that do not diminish the historic character that has remained a pillar of strength and identity within the community. The local zoning ordinance and building codes can also play a major role in protecting a valued part of the community character.

The overall evolution of Columbia as a community has its genesis with the river and commerce driven entities. Today, the influence of the waterway remains ever present but displaying a different hat with a wider brim of interest. Columbia has been identified as a key ecotourism destination within the context of the state-designated Susquehanna Gateway Heritage Area, the Susquehanna Greenway, the River Towns Initiative and the Lower Susquehanna River Water Trail. The adaptive utilization of the river is a combination of recreation, the environment and heritage. At present, River Park evidenced by the walking trails, a boat launch, and canoe and kayaking ramps the transition that will catalyze other business ventures within the Borough. A new kayaking enterprise has located within the business district immediately adjacent to the river. Business ventures such as this will continue to have an impact in the downtown.

Marketing the river and its relationship to the Borough's heritage is essential to attracting a critical mass of visitors and local residents to enjoy the myriad of natural amenities. Expansion of recreational opportunities and the implementation of educational programs are noted in the strategic plan. Both activities complement the recognition of the Borough's potential to garner a positive flow of income from ecotourism and as a place of destination.

Columbia Borough's economic footprint, as described within the Economic Development Strategic Plan, outlines a solid basis for economic restructuring and revitalization. Both results cannot be achieved without addressing what is essential to maintaining the assets within each district. Each district, as a separate entity, cannot attain the desired impact without understanding their interdependence. The river will create commerce for and within the business district, accompanied with physical improvements that enhance all structures of architectural significance within the footprint as well as the community at large. The implementation of the document's plan for action will stir an inevitable meld of events, resulting in a sustainable economic mechanism for future growth and continued prosperity. Most important is the awakening of a strong and productive economic force that has been dormant for decades.

Columbia Borough's intent in creating this Economic Development Strategic Plan was not to create a static document, but rather to commit the community to take a proactive approach for community and economic development. Columbia Borough Council will make this plan an addendum to the Borough Comprehensive Plan. Furthermore, Borough Council will be responsible – through the work of their Community Development Committee – for an annual review of activities and accomplishments. They will also ensure that implementation continues via the many organizations identified as responsible for carrying out the Action Plan Matrix.

APPENDICES

Community & Economic Development Resources

Photo Descriptions

Opportunity Gap Report

21 pages

Data Source: Claritas 2008

Prepared by the Lancaster County Planning commission (9/30/2009)

Demand Growth Report

12 pages

Data Source: Claritas 2008

Prepared by the Lancaster County Planning commission (9/30/2009)

COMMUNITY & ECONOMIC DEVELOPMENT RESOURCES

Financial assistance opportunities for investors, property owners, and developers abound in the Borough of Columbia through established Borough, County of Lancaster, and Commonwealth of Pennsylvania economic development assistance programs. A brief listing of local agencies providing assistance programs, contacts, and contact numbers to obtain detailed information is as follows:

AGENCY	PROGRAM	CONTACT	PHONE
Borough of Columbia www.columbiapa.net	Local Economic Recovery Tax Assistance (LERTA)	Borough Manager	717-684-2467
Borough of Columbia www.columbiapa.net	Keystone Opportunity Zone (KOZ)	Borough Manager	717-684-2467
Columbia Economic Development Corporation	Economic Development Project Assistance	Project Manager	717-684-5678
Columbia Downtown Development Corporation	Economic Development Assistance	Project Chairman	717-684-8486
Lancaster County Housing & Redevelopment Authority http://www.lchra.com/	Redevelopment Project Assistance	Executive Director	717-394-0793
Economic Development Company of Lancaster County http://www.edclancaster.com/	Economic Development Project Assistance	President	717-397-4046
Community First Fund http://www.commfirstfund.org/	Economic Development Project Assistance	Director of Business Lending /Counseling	717-393-2351
Lancaster County Planning Commission www.co.lancaster.pa.us/planning	Economic Development Planning / Land Recycling Initiative	Executive Director	717-299-8333
Pennsylvania Department of Community and Economic Development www.newpa.com	Business Financing	Customer Service	800-379-7448

ADDITIONAL COMMUNITY RESOURCES

Borough of Columbia	www.columbiapa.net
Columbia Borough School District	www.columbia.k12.pa.us
Columbia Public Library	www.columbia.lib.pa.us
Susquehanna Gateway Heritage Area	www.susquehannaheritage.org
Rivertownes PA USA	www.rivertownes.org
PA Arts Experience	www.PaArtsExperience.com
PA Civil War Trails	www.PAcivilwartrails.com

PHOTO DESCRIPTIONS

Page 5	Upper Right	100 Block North Fourth Street
	Center-Right	Columbia Borough Hall (1949)
	Center-Left	North Second & Chestnut Streets
	Bottom	Route 462 Veterans Memorial Bridge (ded. 1930)
Page 6	Top	David Forry Tobacco Warehouse, (Rivertowne Antiques) Bank Avenue
	Bottom	Susquehanna River Shoreline
Page 7		Columbia Market House, (1869) S. Third Street
Page 13		Rt. 462 Veteran's Memorial Bridge
Page 14		Mural, N. Third & Chestnut Streets
Page 25		200 Block Locust Street
Page 26	Top	300 Block Locust Street (Downtown)
	Bottom	Row Homes 600 Block Locust Street
Page 27		Columbia River Park (under construction)
Page 28	Upper-left	North Fifth & Chestnut Streets
	Lower-left	500 Block Cherry Street
	Upper-right	Locust St. east from Front Street
	Lower-right	"Returned Soldier" (1928) Locust Street Park
Page 29		Post Office (before 1862), (Perfect Settings Catering), Second & Locust Streets
Page 31		Hinkle's Pharmacy, (1893) Third & Locust Streets
Page 32		Herr's Hardware, (Burning Bridge Antiques), North Third & Walnut Streets
Page 33		Columbia Market House, South Third Street
Page 34	Top	Homes 100 Block South Second Street
	Bottom	Homes 400 Block Walnut Street (circa 1870-1880)
Page 36		Columbian B & B and Retreat, N. Fourth & Chestnut Streets (circa 1900)
Page 37	Top	Mifflin Home, 100 Block Walnut Street
	Bottom	Poplar St. School, N. Third & Poplar Streets
Page 38		Susquehanna River Shoreline
Page 40	Top	Wright Mansion (1738), S. Second Street
	Bottom	Pennsylvania Railroad Station (1871) Walnut Street
Page 41		Reading & Columbia RR freight station (1883), Bank Avenue
Page 42	Top	Susquehanna River Shoreline
	Bottom	Columbia River Park (Under Construction)

Retail Market Power

Demand Growth Report	Columbia borough, PA			Lancaster city, PA			Harrisburg city, PA		
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$182,112,875	16.65%	\$688,831,647	\$786,025,561	14.11%	\$597,670,349	\$681,052,506	13.95%
Motor Vehicle and Parts Dealers-441									
Automotive Dealers-4411	\$26,697,908	\$32,545,389	21.90%	\$119,261,732	\$142,284,214	19.30%	\$115,618,345	\$138,562,451	19.84%
Other Motor Vehicle Dealers-4412	\$22,957,253	\$28,423,066	23.81%	\$102,798,516	\$124,521,845	21.13%	\$100,179,353	\$121,952,736	21.73%
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,899,200	18.93%	\$7,087,905	\$8,205,766	15.77%	\$7,501,911	\$8,541,175	13.85%
	\$2,143,786	\$2,223,123	3.70%	\$9,375,311	\$9,556,603	1.93%	\$7,937,081	\$8,068,540	1.66%
Furniture and Home Furnishings Stores-442									
Furniture Stores-4421	\$3,455,747	\$4,013,590	16.14%	\$13,871,280	\$15,722,420	13.35%	\$12,939,835	\$14,657,759	13.28%
Home Furnishing Stores-4422	\$1,909,834	\$2,221,786	16.33%	\$7,903,182	\$8,963,499	13.42%	\$7,427,825	\$8,420,755	13.37%
	\$1,545,913	\$1,791,804	15.91%	\$5,968,098	\$6,758,921	13.25%	\$5,512,010	\$6,237,004	13.15%
Electronics and Appliances Stores-443									
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$3,740,012	12.44%	\$15,058,786	\$16,504,771	9.60%	\$13,876,437	\$15,146,322	9.15%
Household Appliances Stores-443111	\$2,537,766	\$2,849,820	12.30%	\$11,544,904	\$12,641,567	9.50%	\$10,435,924	\$11,380,322	9.05%
Radio, Television, Electronics Stores-443112	\$579,382	\$639,993	10.46%	\$2,421,815	\$2,608,945	7.73%	\$2,244,756	\$2,407,948	7.27%
Computer & Software Stores-44312	\$1,958,384	\$2,209,827	12.84%	\$9,123,089	\$10,032,622	9.97%	\$8,191,168	\$8,972,374	9.54%
Camera and Photographic Equipment Stores-44313	\$652,901	\$745,182	14.13%	\$2,950,613	\$3,276,235	11.04%	\$2,916,861	\$3,221,277	10.44%
	\$135,449	\$145,010	7.06%	\$563,269	\$586,970	4.21%	\$523,652	\$544,723	4.02%
Building Material and Garden Equipment Stores-444									
Building Material and Supply Dealers-4441	\$15,744,499	\$17,302,267	9.89%	\$60,632,441	\$65,113,982	7.39%	\$55,702,458	\$59,357,747	6.56%
Home Centers-44411	\$14,465,452	\$15,746,820	8.86%	\$55,515,576	\$59,043,152	6.35%	\$50,940,187	\$53,775,952	5.57%
Paint and Wallpaper Stores-44412	\$5,733,335	\$6,337,226	10.53%	\$21,983,040	\$23,790,719	8.22%	\$20,198,252	\$21,721,673	7.54%
Hardware Stores-44413	\$304,179	\$329,857	8.44%	\$1,162,903	\$1,214,697	4.45%	\$1,074,509	\$1,116,871	3.94%
Other Building Materials Dealers-44419	\$1,180,167	\$1,352,091	14.57%	\$4,707,949	\$5,277,300	12.09%	\$4,368,426	\$4,858,342	11.21%
Building Materials, Lumberyards-444191	\$7,247,771	\$7,727,646	6.62%	\$27,661,684	\$28,760,436	3.97%	\$25,299,000	\$26,079,066	3.08%
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$2,722,487	10.08%	\$9,175,412	\$9,945,407	8.39%	\$8,367,806	\$8,992,489	7.47%
Outdoor Power Equipment Stores-44421	\$1,279,047	\$1,555,447	21.61%	\$5,116,865	\$6,070,830	18.64%	\$4,762,271	\$5,581,795	17.21%
Nursery and Garden Centers-44422	\$201,164	\$226,115	12.40%	\$786,821	\$873,925	11.07%	\$715,557	\$782,178	9.31%
	\$1,077,883	\$1,329,332	23.33%	\$4,330,044	\$5,196,905	20.02%	\$4,046,714	\$4,799,617	18.61%
Food and Beverage Stores-445									
Grocery Stores-4451	\$21,356,858	\$23,688,956	10.92%	\$97,803,890	\$106,825,243	9.22%	\$80,650,716	\$87,639,517	8.67%
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$21,496,043	10.36%	\$88,924,203	\$96,560,095	8.59%	\$74,197,264	\$80,185,606	8.07%
Convenience Stores-44512	\$18,443,120	\$20,345,658	10.32%	\$84,412,955	\$91,656,764	8.58%	\$70,538,314	\$76,228,746	8.07%
Specialty Food Stores-4452	\$1,035,229	\$1,150,385	11.12%	\$4,511,248	\$4,903,331	8.69%	\$3,658,950	\$3,956,860	8.14%
Beer, Wine and Liquor Stores-4453	\$623,913	\$667,235	6.94%	\$2,967,879	\$3,138,631	5.75%	\$2,456,537	\$2,569,652	4.60%
	\$1,254,596	\$1,525,678	21.61%	\$5,911,808	\$7,126,517	20.55%	\$3,996,915	\$4,884,259	22.20%
Health and Personal Care Stores-446									
Pharmacies and Drug Stores-44611	\$7,777,379	\$10,411,788	33.87%	\$32,522,310	\$43,016,445	32.27%	\$29,551,690	\$39,585,369	33.95%
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$6,774,054	\$9,072,068	33.92%	\$28,305,841	\$37,451,494	32.31%	\$25,631,379	\$34,375,291	34.11%
Optical Goods Stores-44613	\$259,933	\$360,865	38.83%	\$1,075,858	\$1,480,449	37.61%	\$994,865	\$1,385,150	39.23%
Other Health and Personal Care Stores-44619	\$266,442	\$330,234	23.94%	\$1,125,636	\$1,378,297	22.45%	\$1,094,342	\$1,332,586	21.77%
	\$476,950	\$648,621	35.99%	\$2,014,975	\$2,706,205	34.30%	\$1,831,104	\$2,492,342	36.11%

Retail Market Power

Demand Growth Report	Columbia borough, PA			Lancaster city, PA			Harrisburg city, PA		
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth
Gasoline Stations-447									
Gasoline Stations with Convenience Stores-44711	\$18,435,658	\$22,588,929	22.53%	\$80,798,668	\$96,950,667	19.99%	\$66,443,180	\$79,350,927	19.43%
Other Gasoline Stations-44719	\$14,061,042	\$17,108,584	21.67%	\$61,493,328	\$73,263,326	19.14%	\$50,420,596	\$59,807,530	18.62%
	\$4,374,616	\$5,480,345	25.28%	\$19,305,340	\$23,687,341	22.70%	\$16,022,584	\$19,543,397	21.97%
Clothing & Clothing Accessories Stores-448									
Clothing Stores-4481	\$6,417,835	\$7,087,727	10.44%	\$31,873,453	\$34,072,210	6.90%	\$28,353,672	\$30,117,042	6.22%
Men's Clothing Stores-44811	\$4,710,700	\$5,138,417	9.08%	\$23,926,527	\$25,294,036	5.72%	\$21,023,765	\$22,054,267	4.90%
Women's Clothing Stores-44812	\$335,647	\$366,413	9.17%	\$1,632,751	\$1,739,311	6.53%	\$1,456,141	\$1,534,444	5.38%
Children's, Infants' Clothing Stores-44813	\$1,110,775	\$1,195,348	7.61%	\$5,887,829	\$6,112,448	3.81%	\$5,045,943	\$5,196,953	2.99%
Family Clothing Stores-44814	\$294,927	\$322,776	9.44%	\$1,553,381	\$1,663,293	7.08%	\$1,437,343	\$1,522,965	5.96%
Clothing Accessories Stores-44815	\$2,575,421	\$2,822,751	9.60%	\$12,868,756	\$13,682,276	6.32%	\$11,333,532	\$11,961,370	5.54%
Other Clothing Stores-44819	\$98,958	\$112,011	13.19%	\$461,861	\$502,728	8.85%	\$423,353	\$460,027	8.66%
Shoe Stores-4482	\$294,972	\$319,118	8.19%	\$1,521,949	\$1,593,980	4.73%	\$1,327,453	\$1,378,508	3.85%
Jewelry, Luggage, Leather Goods Stores-4483	\$864,903	\$949,379	9.77%	\$4,584,815	\$4,906,141	7.01%	\$3,977,311	\$4,207,817	5.80%
Jewelry Stores-44831	\$842,232	\$999,931	18.72%	\$3,362,111	\$3,872,033	15.17%	\$3,352,596	\$3,854,958	14.98%
Luggage and Leather Goods Stores-44832	\$774,275	\$915,408	18.23%	\$3,086,314	\$3,539,832	14.69%	\$3,094,385	\$3,543,375	14.51%
	\$67,957	\$84,523	24.38%	\$275,797	\$332,201	20.45%	\$258,211	\$311,583	20.67%
Sporting Goods, Hobby, Book, Music Stores-451									
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$2,324,556	\$2,621,547	12.78%	\$11,447,871	\$12,477,908	9.00%	\$11,431,083	\$12,284,096	7.46%
Sporting Goods Stores-45111	\$1,605,801	\$1,819,215	13.29%	\$7,276,621	\$8,002,609	9.98%	\$8,264,971	\$8,916,965	7.89%
Hobby, Toys & Games Stores-45112	\$761,237	\$883,217	16.02%	\$3,574,783	\$3,995,013	11.76%	\$4,545,183	\$4,927,185	8.40%
Sew/Needlework/Piece Goods Stores-45113	\$555,149	\$614,900	10.76%	\$2,370,407	\$2,562,182	8.09%	\$2,499,399	\$2,675,755	7.06%
Musical Instrument and Supplies Stores-45114	\$127,853	\$136,829	7.02%	\$499,738	\$523,607	4.78%	\$508,147	\$530,944	4.49%
Book, Periodical and Music Stores-4512	\$161,562	\$184,269	14.05%	\$831,693	\$921,807	10.84%	\$712,242	\$783,081	9.95%
Book Stores and News Dealers-45121	\$718,755	\$802,332	11.63%	\$4,171,250	\$4,475,299	7.29%	\$3,166,112	\$3,367,131	6.35%
Book Stores-451211	\$480,282	\$544,322	13.33%	\$2,961,638	\$3,210,301	8.40%	\$2,109,879	\$2,271,265	7.65%
News Dealers & Newsstands-451212	\$444,088	\$504,632	13.63%	\$2,812,350	\$3,051,332	8.50%	\$1,978,666	\$2,130,552	7.68%
Prerecorded Tapes, CDs, Record Stores-45122	\$36,194	\$39,690	9.66%	\$149,288	\$158,969	6.48%	\$131,213	\$140,713	7.24%
	\$238,473	\$258,010	8.19%	\$1,209,612	\$1,264,998	4.58%	\$1,056,233	\$1,095,866	3.75%
General Merchandise Stores-452									
Department Stores Excluding Leased Departments-4521	\$18,617,428	\$20,978,490	12.68%	\$84,896,722	\$93,401,173	10.02%	\$75,431,966	\$82,708,096	9.65%
Other General Merchandise Stores-4529	\$8,333,790	\$9,493,585	13.92%	\$38,419,627	\$42,560,773	10.78%	\$35,200,403	\$38,857,398	10.39%
Warehouse Clubs and Super Stores-45291	\$10,283,638	\$11,484,905	11.68%	\$46,477,095	\$50,840,400	9.39%	\$40,231,563	\$43,850,698	9.00%
All Other General Merchandise Stores-45299	\$8,965,055	\$9,987,423	11.40%	\$40,802,836	\$44,543,130	9.17%	\$35,068,393	\$38,126,651	8.72%
	\$1,318,583	\$1,497,482	13.57%	\$5,674,259	\$6,297,270	10.98%	\$5,163,170	\$5,724,047	10.86%
Miscellaneous Store Retailers-453									
Florists-4531	\$3,999,212	\$4,443,503	11.11%	\$15,884,604	\$17,163,715	8.05%	\$13,623,076	\$14,832,490	8.88%
Office Supplies, Stationery, Gift Stores-4532	\$269,186	\$301,680	12.07%	\$1,065,650	\$1,167,175	9.53%	\$993,535	\$1,084,786	9.18%
Office Supplies, Stationery Stores-45321	\$1,566,326	\$1,708,894	9.10%	\$5,920,353	\$6,251,634	5.60%	\$5,004,022	\$5,359,693	7.11%
Gift, Novelty and Souvenir Stores-45322	\$891,445	\$974,489	9.32%	\$3,356,854	\$3,551,755	5.81%	\$2,855,526	\$3,066,578	7.39%
Used Merchandise Stores-4533	\$674,881	\$734,405	8.82%	\$2,563,499	\$2,699,879	5.32%	\$2,148,496	\$2,293,115	6.73%
Other Miscellaneous Store Retailers-4539	\$310,571	\$341,808	10.06%	\$1,360,546	\$1,450,228	6.59%	\$1,178,650	\$1,259,155	6.83%
	\$1,853,129	\$2,091,121	12.84%	\$7,538,055	\$8,294,678	10.04%	\$6,446,869	\$7,128,856	10.58%

Retail Market Power

Demand Growth Report	Columbia borough, PA			Lancaster city, PA			Harrisburg city, PA		
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth
Non-Store Retailers-454									
Electronic Shopping, Mail-Order Houses-4541	\$11,600,568	\$12,531,946	8.03%	\$51,649,846	\$54,363,517	5.25%	\$47,657,556	\$49,931,533	4.77%
Vending Machine Operators-4542	\$6,317,629	\$7,297,601	15.51%	\$28,100,938	\$31,536,982	12.23%	\$25,967,588	\$29,158,343	12.29%
Direct Selling Establishments-4543	\$449,726	\$496,939	10.50%	\$2,066,001	\$2,243,116	8.57%	\$1,633,930	\$1,756,656	7.51%
	\$4,833,213	\$4,737,406	-1.98%	\$21,482,907	\$20,583,419	-4.19%	\$20,056,038	\$19,016,534	-5.18%
Foodservice and Drinking Places-722									
Full-Service Restaurants-7221	\$16,363,711	\$20,158,731	23.19%	\$73,130,044	\$88,129,295	20.51%	\$46,390,335	\$56,879,157	22.61%
Limited Service Eating Places-7222	\$7,526,136	\$9,245,335	22.84%	\$33,514,539	\$40,269,751	20.16%	\$21,077,965	\$25,810,993	22.45%
Special Foodservices-7223	\$6,696,014	\$8,344,819	24.62%	\$30,265,258	\$36,905,000	21.94%	\$19,510,492	\$24,109,126	23.57%
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$1,693,381	23.89%	\$6,159,075	\$7,465,566	21.21%	\$4,023,478	\$4,937,933	22.73%
	\$774,749	\$875,196	12.97%	\$3,191,172	\$3,488,978	9.33%	\$1,778,400	\$2,021,105	13.65%

Retail Market Power

Demand Growth Report	Columbia borough, PA			York city, PA			Lititz borough, PA	
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$182,112,875	16.65%	\$487,974,006	\$565,744,202	15.94%	\$152,382,912	\$180,869,268
Motor Vehicle and Parts Dealers-441								
Automotive Dealers-4411	\$26,697,908	\$32,545,389	21.90%	\$98,017,549	\$120,785,308	23.23%	\$27,019,757	\$33,386,128
Other Motor Vehicle Dealers-4412	\$22,957,253	\$28,423,066	23.81%	\$85,175,476	\$106,732,192	25.31%	\$23,189,822	\$29,118,811
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,899,200	18.93%	\$5,926,573	\$6,898,653	16.40%	\$1,610,642	\$1,940,267
	\$2,143,786	\$2,223,123	3.70%	\$6,915,500	\$7,154,463	3.46%	\$2,219,293	\$2,327,050
Furniture and Home Furnishings Stores-442								
Furniture Stores-4421	\$3,455,747	\$4,013,590	16.14%	\$9,688,709	\$11,116,157	14.73%	\$3,501,399	\$4,122,426
Home Furnishing Stores-4422	\$1,909,834	\$2,221,786	16.33%	\$5,577,007	\$6,393,896	14.65%	\$1,922,950	\$2,270,198
	\$1,545,913	\$1,791,804	15.91%	\$4,111,702	\$4,722,261	14.85%	\$1,578,449	\$1,852,228
Electronics and Appliances Stores-443								
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$3,740,012	12.44%	\$10,577,962	\$11,754,959	11.13%	\$3,281,539	\$3,739,527
Household Appliances Stores-443111	\$2,537,766	\$2,849,820	12.30%	\$8,051,085	\$8,937,117	11.01%	\$2,488,835	\$2,834,384
Radio, Television, Electronics Stores-443112	\$579,382	\$639,993	10.46%	\$1,748,553	\$1,905,744	8.99%	\$566,789	\$634,513
Computer & Software Stores-44312	\$1,958,384	\$2,209,827	12.84%	\$6,302,532	\$7,031,373	11.56%	\$1,922,046	\$2,199,871
Camera and Photographic Equipment Stores-44313	\$652,901	\$745,182	14.13%	\$2,140,584	\$2,408,552	12.52%	\$656,099	\$757,351
	\$135,449	\$145,010	7.06%	\$386,293	\$409,290	5.95%	\$136,605	\$147,792
Building Material and Garden Equipment Stores-444								
Building Material and Supply Dealers-4441	\$15,744,499	\$17,302,267	9.89%	\$43,986,817	\$47,435,767	7.84%	\$15,660,219	\$17,456,765
Home Centers-44411	\$14,465,452	\$15,746,820	8.86%	\$40,292,909	\$43,054,620	6.85%	\$14,396,778	\$15,904,368
Paint and Wallpaper Stores-44412	\$5,733,335	\$6,337,226	10.53%	\$15,926,504	\$17,347,340	8.92%	\$5,693,722	\$6,376,186
Hardware Stores-44413	\$304,179	\$329,857	8.44%	\$817,042	\$858,429	5.07%	\$306,376	\$335,510
Other Building Materials Dealers-44419	\$1,180,167	\$1,352,091	14.57%	\$3,415,304	\$3,861,274	13.06%	\$1,167,656	\$1,357,665
Building Materials, Lumberyards-444191	\$7,247,771	\$7,727,646	6.62%	\$20,134,059	\$20,987,577	4.24%	\$7,229,024	\$7,835,007
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$2,722,487	10.08%	\$6,603,707	\$7,200,733	9.04%	\$2,469,154	\$2,758,703
Outdoor Power Equipment Stores-44421	\$1,279,047	\$1,555,447	21.61%	\$3,693,908	\$4,381,147	18.60%	\$1,263,441	\$1,552,397
Nursery and Garden Centers-44422	\$201,164	\$226,115	12.40%	\$566,069	\$632,208	11.68%	\$198,147	\$226,902
	\$1,077,883	\$1,329,332	23.33%	\$3,127,839	\$3,748,939	19.86%	\$1,065,294	\$1,325,495
Food and Beverage Stores-445								
Grocery Stores-4451	\$21,356,858	\$23,688,956	10.92%	\$67,792,676	\$74,810,041	10.35%	\$19,889,732	\$22,537,530
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$21,496,043	10.36%	\$62,408,193	\$68,451,712	9.68%	\$18,113,706	\$20,427,440
Convenience Stores-44512	\$18,443,120	\$20,345,658	10.32%	\$59,247,669	\$65,000,558	9.71%	\$17,168,901	\$19,354,950
Specialty Food Stores-4452	\$1,035,229	\$1,150,385	11.12%	\$3,160,524	\$3,451,154	9.20%	\$944,805	\$1,072,490
Beer, Wine and Liquor Stores-4453	\$623,913	\$667,235	6.94%	\$2,052,803	\$2,189,442	6.66%	\$576,648	\$629,870
	\$1,254,596	\$1,525,678	21.61%	\$3,331,680	\$4,168,887	25.13%	\$1,199,378	\$1,480,220
Health and Personal Care Stores-446								
Pharmacies and Drug Stores-44611	\$7,777,379	\$10,411,788	33.87%	\$23,397,215	\$31,648,292	35.27%	\$7,594,122	\$10,367,666
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$6,774,054	\$9,072,068	33.92%	\$20,384,942	\$27,580,231	35.30%	\$6,604,759	\$9,024,965
Optical Goods Stores-44613	\$259,933	\$360,865	38.83%	\$781,046	\$1,099,888	40.82%	\$255,873	\$361,791
Other Health and Personal Care Stores-44619	\$266,442	\$330,234	23.94%	\$776,441	\$968,620	24.75%	\$268,171	\$334,929
	\$476,950	\$648,621	35.99%	\$1,454,786	\$1,999,553	37.45%	\$465,319	\$645,981

Retail Market Power

Demand Growth Report	Columbia borough, PA			York city, PA			Lititz borough, PA	
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand
Gasoline Stations-447								
Gasoline Stations with Convenience Stores-44711	\$18,435,658	\$22,588,929	22.53%	\$56,891,246	\$69,001,969	21.29%	\$17,936,983	\$22,417,001
Other Gasoline Stations-44719	\$14,061,042	\$17,108,584	21.67%	\$43,279,536	\$52,088,283	20.35%	\$13,575,791	\$16,862,947
	\$4,374,616	\$5,480,345	25.28%	\$13,611,710	\$16,913,686	24.26%	\$4,361,192	\$5,554,054
Clothing & Clothing Accessories Stores-448								
Clothing Stores-4481	\$6,417,835	\$7,087,727	10.44%	\$21,622,795	\$23,374,441	8.10%	\$6,245,880	\$6,977,064
Men's Clothing Stores-44811	\$4,710,700	\$5,138,417	9.08%	\$16,313,298	\$17,424,800	6.81%	\$4,559,371	\$5,025,181
Women's Clothing Stores-44812	\$335,647	\$366,413	9.17%	\$1,148,389	\$1,236,481	7.67%	\$316,324	\$351,021
Children's, Infants' Clothing Stores-44813	\$1,110,775	\$1,195,348	7.61%	\$3,869,674	\$4,049,612	4.65%	\$1,096,444	\$1,182,940
Family Clothing Stores-44814	\$294,927	\$322,776	9.44%	\$1,140,328	\$1,235,296	8.33%	\$273,823	\$307,391
Clothing Accessories Stores-44815	\$2,575,421	\$2,822,751	9.60%	\$8,822,365	\$9,480,855	7.46%	\$2,486,289	\$2,757,676
Other Clothing Stores-44819	\$98,958	\$112,011	13.19%	\$301,617	\$332,994	10.40%	\$99,706	\$113,608
Shoe Stores-4482	\$294,972	\$319,118	8.19%	\$1,030,925	\$1,089,562	5.69%	\$286,785	\$312,545
Jewelry, Luggage, Leather Goods Stores-4483	\$864,903	\$949,379	9.77%	\$3,182,286	\$3,438,934	8.06%	\$808,288	\$903,735
Jewelry Stores-44831	\$842,232	\$999,931	18.72%	\$2,127,211	\$2,510,707	18.03%	\$878,221	\$1,048,148
Luggage and Leather Goods Stores-44832	\$774,275	\$915,408	18.23%	\$1,949,890	\$2,293,602	17.63%	\$806,953	\$959,559
	\$67,957	\$84,523	24.38%	\$177,321	\$217,105	22.44%	\$71,268	\$88,589
Sporting Goods, Hobby, Book, Music Stores-451								
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$2,324,556	\$2,621,547	12.78%	\$8,717,515	\$9,504,554	9.03%	\$2,404,535	\$2,740,824
Sporting Goods Stores-45111	\$1,605,801	\$1,819,215	13.29%	\$6,281,804	\$6,890,002	9.68%	\$1,628,352	\$1,866,586
Hobby, Toys & Games Stores-45112	\$761,237	\$883,217	16.02%	\$3,404,142	\$3,764,701	10.59%	\$778,987	\$912,027
Sew/Needlework/Piece Goods Stores-45113	\$555,149	\$614,900	10.76%	\$1,919,765	\$2,073,970	8.03%	\$558,383	\$628,225
Musical Instrument and Supplies Stores-45114	\$127,853	\$136,829	7.02%	\$401,758	\$424,851	5.75%	\$131,522	\$142,370
Book, Periodical and Music Stores-4512	\$161,562	\$184,269	14.05%	\$556,139	\$626,480	12.65%	\$159,460	\$183,964
Book Stores and News Dealers-45121	\$718,755	\$802,332	11.63%	\$2,435,711	\$2,614,552	7.34%	\$776,183	\$874,238
Book Stores-451211	\$480,282	\$544,322	13.33%	\$1,619,852	\$1,747,246	7.86%	\$545,170	\$621,036
News Dealers & Newsstands-451212	\$444,088	\$504,632	13.63%	\$1,513,612	\$1,633,263	7.90%	\$508,998	\$580,761
Prerecorded Tapes, CDs, Record Stores-45122	\$36,194	\$39,690	9.66%	\$106,240	\$113,983	7.29%	\$36,172	\$40,275
	\$238,473	\$258,010	8.19%	\$815,859	\$867,306	6.31%	\$231,013	\$253,202
General Merchandise Stores-452								
Department Stores Excluding Leased Departments-4521	\$18,617,428	\$20,978,490	12.68%	\$60,423,551	\$67,210,038	11.23%	\$17,922,950	\$20,550,680
Other General Merchandise Stores-4529	\$8,333,790	\$9,493,585	13.92%	\$27,441,288	\$30,769,752	12.13%	\$8,126,418	\$9,398,110
Warehouse Clubs and Super Stores-45291	\$10,283,638	\$11,484,905	11.68%	\$32,982,263	\$36,440,286	10.48%	\$9,796,532	\$11,152,570
All Other General Merchandise Stores-45299	\$8,965,055	\$9,987,423	11.40%	\$28,915,983	\$31,880,147	10.25%	\$8,498,330	\$9,655,131
	\$1,318,583	\$1,497,482	13.57%	\$4,066,280	\$4,560,139	12.15%	\$1,298,202	\$1,497,439
Miscellaneous Store Retailers-453								
Florists-4531	\$3,999,212	\$4,443,503	11.11%	\$11,035,034	\$12,006,311	8.80%	\$3,937,413	\$4,443,242
Office Supplies, Stationery, Gift Stores-4532	\$269,186	\$301,680	12.07%	\$747,958	\$828,001	10.70%	\$269,155	\$305,051
Office Supplies, Stationery Stores-45321	\$1,566,326	\$1,708,894	9.10%	\$4,053,094	\$4,292,229	5.90%	\$1,571,875	\$1,741,538
Gift, Novelty and Souvenir Stores-45322	\$891,445	\$974,489	9.32%	\$2,311,339	\$2,454,181	6.18%	\$893,610	\$992,175
Used Merchandise Stores-4533	\$674,881	\$734,405	8.82%	\$1,741,755	\$1,838,048	5.53%	\$678,265	\$749,363
Other Miscellaneous Store Retailers-4539	\$310,571	\$341,808	10.06%	\$922,659	\$989,244	7.22%	\$311,539	\$347,470
	\$1,853,129	\$2,091,121	12.84%	\$5,311,323	\$5,896,837	11.02%	\$1,784,844	\$2,049,183

Retail Market Power

Demand Growth Report	Columbia borough, PA			York city, PA		Lititz borough, PA		
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand
Non-Store Retailers-454								
Electronic Shopping, Mail-Order Houses-4541	\$11,600,568	\$12,531,946	8.03%	\$37,411,029	\$39,717,668	6.17%	\$11,229,620	\$12,364,153
Vending Machine Operators-4542	\$6,317,629	\$7,297,601	15.51%	\$19,865,571	\$22,592,771	13.73%	\$6,311,438	\$7,382,332
Direct Selling Establishments-4543	\$449,726	\$496,939	10.50%	\$1,384,289	\$1,509,516	9.05%	\$417,399	\$471,266
	\$4,833,213	\$4,737,406	-1.98%	\$16,161,169	\$15,615,381	-3.38%	\$4,500,783	\$4,510,555
Foodservice and Drinking Places-722								
Full-Service Restaurants-7221	\$16,363,711	\$20,158,731	23.19%	\$38,411,908	\$47,378,697	23.34%	\$15,758,763	\$19,766,262
Limited Service Eating Places-7222	\$7,526,136	\$9,245,335	22.84%	\$17,428,160	\$21,457,822	23.12%	\$7,255,323	\$9,073,064
Special Foodservices-7223	\$6,696,014	\$8,344,819	24.62%	\$16,231,068	\$20,201,836	24.46%	\$6,428,680	\$8,161,476
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$1,693,381	23.89%	\$3,337,190	\$4,127,097	23.67%	\$1,314,252	\$1,658,352
	\$774,749	\$875,196	12.97%	\$1,415,490	\$1,591,942	12.47%	\$760,508	\$873,370

Retail Market Power

Demand Growth Report	Columbia borough, PA			Elizabethtown borough, PA			Mount Joy borough,		
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$182,112,875	16.65%	\$190,739,669	\$228,153,561	19.62%	\$130,355,333	\$160,652,468	
Motor Vehicle and Parts Dealers-441									
Automotive Dealers-4411	\$26,697,908	\$32,545,389	21.90%	\$34,832,958	\$43,529,734	24.97%	\$24,649,129	\$31,767,140	
Other Motor Vehicle Dealers-4412	\$22,957,253	\$28,423,066	23.81%	\$29,820,228	\$37,902,454	27.10%	\$21,216,968	\$27,800,070	
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,899,200	18.93%	\$2,120,497	\$2,576,278	21.49%	\$1,420,294	\$1,783,312	
	\$2,143,786	\$2,223,123	3.70%	\$2,892,233	\$3,051,002	5.49%	\$2,011,867	\$2,183,758	
Furniture and Home Furnishings Stores-442									
Furniture Stores-4421	\$3,455,747	\$4,013,590	16.14%	\$4,214,197	\$5,042,462	19.65%	\$2,992,986	\$3,695,718	
Home Furnishing Stores-4422	\$1,909,834	\$2,221,786	16.33%	\$2,292,864	\$2,761,070	20.42%	\$1,641,612	\$2,030,472	
	\$1,545,913	\$1,791,804	15.91%	\$1,921,333	\$2,281,392	18.74%	\$1,351,374	\$1,665,246	
Electronics and Appliances Stores-443									
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$3,740,012	12.44%	\$4,469,208	\$5,114,913	14.45%	\$2,852,027	\$3,382,149	
Household Appliances Stores-443111	\$2,537,766	\$2,849,820	12.30%	\$3,300,102	\$3,782,050	14.60%	\$2,152,880	\$2,552,014	
Radio, Television, Electronics Stores-443112	\$579,382	\$639,993	10.46%	\$683,010	\$772,882	13.16%	\$478,115	\$557,204	
Computer & Software Stores-44312	\$1,958,384	\$2,209,827	12.84%	\$2,617,092	\$3,009,168	14.98%	\$1,674,765	\$1,994,810	
Camera and Photographic Equipment Stores-44313	\$652,901	\$745,182	14.13%	\$986,580	\$1,133,788	14.92%	\$579,648	\$695,809	
	\$135,449	\$145,010	7.06%	\$182,526	\$199,075	9.07%	\$119,499	\$134,326	
Building Material and Garden Equipment Stores-444									
Building Material and Supply Dealers-4441	\$15,744,499	\$17,302,267	9.89%	\$18,291,067	\$20,517,161	12.17%	\$13,288,006	\$15,447,681	
Home Centers-44411	\$14,465,452	\$15,746,820	8.86%	\$16,810,390	\$18,674,693	11.09%	\$12,210,512	\$14,068,257	
Paint and Wallpaper Stores-44412	\$5,733,335	\$6,337,226	10.53%	\$6,654,294	\$7,514,231	12.92%	\$4,816,547	\$5,633,505	
Hardware Stores-44413	\$304,179	\$329,857	8.44%	\$360,023	\$398,941	10.81%	\$262,574	\$300,105	
Other Building Materials Dealers-44419	\$1,180,167	\$1,352,091	14.57%	\$1,393,562	\$1,635,315	17.35%	\$996,237	\$1,204,337	
Building Materials, Lumberyards-444191	\$7,247,771	\$7,727,646	6.62%	\$8,402,511	\$9,126,206	8.61%	\$6,135,154	\$6,930,310	
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$2,722,487	10.08%	\$2,871,216	\$3,217,569	12.06%	\$2,101,012	\$2,449,734	
Outdoor Power Equipment Stores-44421	\$1,279,047	\$1,555,447	21.61%	\$1,480,677	\$1,842,468	24.43%	\$1,077,494	\$1,379,424	
Nursery and Garden Centers-44422	\$201,164	\$226,115	12.40%	\$228,693	\$261,884	14.51%	\$169,899	\$198,161	
	\$1,077,883	\$1,329,332	23.33%	\$1,251,984	\$1,580,584	26.25%	\$907,595	\$1,181,263	
Food and Beverage Stores-445									
Grocery Stores-4451	\$21,356,858	\$23,688,956	10.92%	\$23,467,126	\$26,872,605	14.51%	\$16,308,538	\$19,093,146	
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$21,496,043	10.36%	\$21,206,066	\$24,149,471	13.88%	\$14,822,796	\$17,264,671	
Convenience Stores-44512	\$18,443,120	\$20,345,658	10.32%	\$20,061,718	\$22,836,833	13.83%	\$14,032,117	\$16,338,224	
Specialty Food Stores-4452	\$1,035,229	\$1,150,385	11.12%	\$1,144,348	\$1,312,638	14.71%	\$790,679	\$926,447	
Beer, Wine and Liquor Stores-4453	\$623,913	\$667,235	6.94%	\$671,893	\$742,265	10.47%	\$472,966	\$534,732	
	\$1,254,596	\$1,525,678	21.61%	\$1,589,167	\$1,980,869	24.65%	\$1,012,776	\$1,293,743	
Health and Personal Care Stores-446									
Pharmacies and Drug Stores-44611	\$7,777,379	\$10,411,788	33.87%	\$8,526,981	\$11,631,010	36.40%	\$5,843,067	\$8,184,583	
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$6,774,054	\$9,072,068	33.92%	\$7,413,693	\$10,111,377	36.39%	\$5,074,854	\$7,109,165	
Optical Goods Stores-44613	\$259,933	\$360,865	38.83%	\$281,161	\$397,618	41.42%	\$192,771	\$280,107	
Other Health and Personal Care Stores-44619	\$266,442	\$330,234	23.94%	\$317,996	\$408,549	28.48%	\$223,168	\$293,204	
	\$476,950	\$648,621	35.99%	\$514,131	\$713,466	38.77%	\$352,274	\$502,107	

Retail Market Power

Demand Growth Report	Columbia borough, PA			Elizabethtown borough, PA			Mount Joy borough, PA		
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth
Gasoline Stations-447	\$18,435,658	\$22,588,929	22.53%	\$21,621,525	\$27,297,377	26.25%	\$15,488,314	\$20,045,515	
Gasoline Stations with Convenience Stores-44711	\$14,061,042	\$17,108,584	21.67%	\$16,370,085	\$20,541,484	25.48%	\$11,695,916	\$15,042,296	
Other Gasoline Stations-44719	\$4,374,616	\$5,480,345	25.28%	\$5,251,440	\$6,755,893	28.65%	\$3,792,398	\$5,003,219	
Clothing & Clothing Accessories Stores-448	\$6,417,835	\$7,087,727	10.44%	\$8,920,405	\$10,034,486	12.49%	\$5,566,156	\$6,510,761	
Clothing Stores-4481	\$4,710,700	\$5,138,417	9.08%	\$6,610,339	\$7,343,678	11.09%	\$4,053,618	\$4,682,372	
Men's Clothing Stores-44811	\$335,647	\$366,413	9.17%	\$442,428	\$494,325	11.73%	\$281,356	\$325,918	
Women's Clothing Stores-44812	\$1,110,775	\$1,195,348	7.61%	\$1,724,039	\$1,884,001	9.28%	\$994,983	\$1,134,748	
Children's, Infants' Clothing Stores-44813	\$294,927	\$322,776	9.44%	\$317,255	\$359,383	13.28%	\$226,838	\$262,633	
Family Clothing Stores-44814	\$2,575,421	\$2,822,751	9.60%	\$3,550,166	\$3,964,490	11.67%	\$2,202,194	\$2,555,191	
Clothing Accessories Stores-44815	\$98,958	\$112,011	13.19%	\$142,005	\$163,250	14.96%	\$89,935	\$107,713	
Other Clothing Stores-44819	\$294,972	\$319,118	8.19%	\$434,446	\$478,229	10.08%	\$258,312	\$296,169	
Shoe Stores-4482	\$864,903	\$949,379	9.77%	\$1,174,180	\$1,311,933	11.73%	\$721,380	\$837,794	
Jewelry, Luggage, Leather Goods Stores-4483	\$842,232	\$999,931	18.72%	\$1,135,886	\$1,378,875	21.39%	\$791,158	\$990,595	
Jewelry Stores-44831	\$774,275	\$915,408	18.23%	\$1,041,280	\$1,259,215	20.93%	\$727,671	\$907,732	
Luggage and Leather Goods Stores-44832	\$67,957	\$84,523	24.38%	\$94,606	\$119,660	26.48%	\$63,487	\$82,863	
Sporting Goods, Hobby, Book, Music Stores-451	\$2,324,556	\$2,621,547	12.78%	\$3,937,043	\$4,492,907	14.12%	\$2,090,798	\$2,486,395	
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$1,605,801	\$1,819,215	13.29%	\$2,234,718	\$2,582,736	15.57%	\$1,439,704	\$1,719,200	
Sporting Goods Stores-45111	\$761,237	\$883,217	16.02%	\$1,118,130	\$1,316,162	17.71%	\$700,694	\$857,203	
Hobby, Toys & Games Stores-45112	\$555,149	\$614,900	10.76%	\$710,983	\$809,084	13.80%	\$483,256	\$563,586	
Sew/Needlework/Piece Goods Stores-45113	\$127,853	\$136,829	7.02%	\$166,291	\$182,703	9.87%	\$112,938	\$127,082	
Musical Instrument and Supplies Stores-45114	\$161,562	\$184,269	14.05%	\$239,314	\$274,787	14.82%	\$142,816	\$171,329	
Book, Periodical and Music Stores-4512	\$718,755	\$802,332	11.63%	\$1,702,325	\$1,910,171	12.21%	\$651,094	\$767,195	
Book Stores and News Dealers-45121	\$480,282	\$544,322	13.33%	\$1,323,416	\$1,497,557	13.16%	\$438,626	\$526,656	
Book Stores-451211	\$444,088	\$504,632	13.63%	\$1,277,484	\$1,445,960	13.19%	\$409,875	\$493,438	
News Dealers & Newsstands-451212	\$36,194	\$39,690	9.66%	\$45,932	\$51,597	12.33%	\$28,751	\$33,218	
Prerecorded Tapes, CDs, Record Stores-45122	\$238,473	\$258,010	8.19%	\$378,909	\$412,614	8.90%	\$212,468	\$240,539	
General Merchandise Stores-452	\$18,617,428	\$20,978,490	12.68%	\$22,780,168	\$26,267,481	15.31%	\$15,174,514	\$18,027,832	
Department Stores Excluding Leased Departments-4521	\$8,333,790	\$9,493,585	13.92%	\$10,626,423	\$12,321,716	15.95%	\$6,959,375	\$8,347,285	
Other General Merchandise Stores-4529	\$10,283,638	\$11,484,905	11.68%	\$12,153,745	\$13,945,765	14.74%	\$8,215,139	\$9,680,547	
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$9,987,423	11.40%	\$10,524,518	\$12,052,804	14.52%	\$7,110,925	\$8,360,130	
All Other General Merchandise Stores-45299	\$1,318,583	\$1,497,482	13.57%	\$1,629,227	\$1,892,961	16.19%	\$1,104,214	\$1,320,417	
Miscellaneous Store Retailers-453	\$3,999,212	\$4,443,503	11.11%	\$4,986,924	\$5,688,297	14.06%	\$3,340,977	\$3,916,129	
Florists-4531	\$269,186	\$301,680	12.07%	\$326,313	\$375,430	15.05%	\$231,207	\$271,854	
Office Supplies, Stationery, Gift Stores-4532	\$1,566,326	\$1,708,894	9.10%	\$2,011,633	\$2,254,447	12.07%	\$1,327,357	\$1,528,413	
Office Supplies, Stationery Stores-45321	\$891,445	\$974,489	9.32%	\$1,148,313	\$1,288,548	12.21%	\$755,444	\$871,595	
Gift, Novelty and Souvenir Stores-45322	\$674,881	\$734,405	8.82%	\$863,320	\$965,899	11.88%	\$571,913	\$656,818	
Used Merchandise Stores-4533	\$310,571	\$341,808	10.06%	\$434,160	\$489,156	12.67%	\$267,122	\$311,102	
Other Miscellaneous Store Retailers-4539	\$1,853,129	\$2,091,121	12.84%	\$2,214,818	\$2,569,264	16.00%	\$1,515,291	\$1,804,760	

Retail Market Power

Demand Growth Report	Columbia borough, PA			Elizabethtown borough, PA			Mount Joy borough, PA	
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand
Non-Store Retailers-454								
Electronic Shopping, Mail-Order Houses-4541	\$11,600,568	\$12,531,946	8.03%	\$14,600,084	\$16,207,123	11.01%	\$9,423,661	\$10,777,547
Vending Machine Operators-4542	\$6,317,629	\$7,297,601	15.51%	\$8,812,567	\$10,264,123	16.47%	\$5,410,693	\$6,553,128
Direct Selling Establishments-4543	\$449,726	\$496,939	10.50%	\$497,499	\$568,765	14.32%	\$345,478	\$403,721
	\$4,833,213	\$4,737,406	-1.98%	\$5,290,018	\$5,374,235	1.59%	\$3,667,490	\$3,820,698
Foodservice and Drinking Places-722								
Full-Service Restaurants-7221	\$16,363,711	\$20,158,731	23.19%	\$20,091,983	\$25,458,005	26.71%	\$13,337,160	\$17,317,872
Limited Service Eating Places-7222	\$7,526,136	\$9,245,335	22.84%	\$9,253,094	\$11,689,316	26.33%	\$6,137,538	\$7,946,653
Special Foodservices-7223	\$6,696,014	\$8,344,819	24.62%	\$8,196,230	\$10,510,660	28.24%	\$5,449,151	\$7,157,494
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$1,693,381	23.89%	\$1,674,381	\$2,134,017	27.45%	\$1,113,950	\$1,454,699
	\$774,749	\$875,196	12.97%	\$968,278	\$1,124,012	16.08%	\$636,521	\$759,026

Retail Market Power

Demand Growth Report	Columbia borough, PA			PA		Middletown borough, PA		
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$182,112,875	16.65%	\$136,614,795	23.24%	\$156,686,546		14.69%
Motor Vehicle and Parts Dealers-441								
Automotive Dealers-4411	\$26,697,908	\$32,545,389	21.90%	\$27,771,701	28.88%	\$33,500,320		20.63%
Other Motor Vehicle Dealers-4412	\$22,957,253	\$28,423,066	23.81%	\$24,019,276	31.03%	\$29,473,709		22.71%
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,899,200	18.93%	\$1,661,545	25.56%	\$1,914,358		15.22%
	\$2,143,786	\$2,223,123	3.70%	\$2,090,880	8.54%	\$2,112,253		1.02%
Furniture and Home Furnishings Stores-442								
Furniture Stores-4421	\$3,455,747	\$4,013,590	16.14%	\$2,849,958	23.48%	\$3,236,705		13.57%
Home Furnishing Stores-4422	\$1,909,834	\$2,221,786	16.33%	\$1,600,269	23.69%	\$1,820,568		13.77%
	\$1,545,913	\$1,791,804	15.91%	\$1,249,689	23.23%	\$1,416,137		13.32%
Electronics and Appliances Stores-443								
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$3,740,012	12.44%	\$2,980,110	18.59%	\$3,269,216		9.70%
Household Appliances Stores-443111	\$2,537,766	\$2,849,820	12.30%	\$2,230,781	18.54%	\$2,443,909		9.55%
Radio, Television, Electronics Stores-443112	\$579,382	\$639,993	10.46%	\$490,791	16.54%	\$527,974		7.58%
Computer & Software Stores-44312	\$1,958,384	\$2,209,827	12.84%	\$1,739,990	19.11%	\$1,915,935		10.11%
Camera and Photographic Equipment Stores-44313	\$652,901	\$745,182	14.13%	\$631,422	20.04%	\$701,494		11.10%
	\$135,449	\$145,010	7.06%	\$117,907	12.41%	\$123,813		5.01%
Building Material and Garden Equipment Stores-444								
Building Material and Supply Dealers-4441	\$15,744,499	\$17,302,267	9.89%	\$12,645,856	16.25%	\$13,485,631		6.64%
Home Centers-44411	\$14,465,452	\$15,746,820	8.86%	\$11,572,057	15.21%	\$12,234,159		5.72%
Paint and Wallpaper Stores-44412	\$5,733,335	\$6,337,226	10.53%	\$4,604,317	16.96%	\$4,946,902		7.44%
Hardware Stores-44413	\$304,179	\$329,857	8.44%	\$242,274	14.29%	\$252,010		4.02%
Other Building Materials Dealers-44419	\$1,180,167	\$1,352,091	14.57%	\$980,596	20.89%	\$1,094,129		11.58%
Building Materials, Lumberyards-444191	\$7,247,771	\$7,727,646	6.62%	\$5,744,870	12.96%	\$5,941,118		3.42%
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$2,722,487	10.08%	\$1,955,974	16.60%	\$2,097,988		7.26%
Outdoor Power Equipment Stores-44421	\$1,279,047	\$1,555,447	21.61%	\$1,073,799	28.02%	\$1,251,472		16.55%
Nursery and Garden Centers-44422	\$201,164	\$226,115	12.40%	\$165,713	16.63%	\$179,881		8.55%
	\$1,077,883	\$1,329,332	23.33%	\$908,086	30.15%	\$1,071,591		18.01%
Food and Beverage Stores-445								
Grocery Stores-4451	\$21,356,858	\$23,688,956	10.92%	\$17,731,289	17.07%	\$19,385,034		9.33%
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$21,496,043	10.36%	\$16,286,381	16.47%	\$17,702,298		8.69%
Convenience Stores-44512	\$18,443,120	\$20,345,658	10.32%	\$15,414,705	16.43%	\$16,752,348		8.68%
Specialty Food Stores-4452	\$1,035,229	\$1,150,385	11.12%	\$871,676	17.17%	\$949,951		8.98%
Beer, Wine and Liquor Stores-4453	\$623,913	\$667,235	6.94%	\$511,856	13.06%	\$537,936		5.10%
	\$1,254,596	\$1,525,678	21.61%	\$933,052	27.74%	\$1,144,800		22.69%
Health and Personal Care Stores-446								
Pharmacies and Drug Stores-44611	\$7,777,379	\$10,411,788	33.87%	\$6,749,448	40.07%	\$8,949,755		32.60%
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$6,774,054	\$9,072,068	33.92%	\$5,875,797	40.09%	\$7,795,064		32.66%
Optical Goods Stores-44613	\$259,933	\$360,865	38.83%	\$226,503	45.31%	\$311,623		37.58%
Other Health and Personal Care Stores-44619	\$266,442	\$330,234	23.94%	\$234,175	31.38%	\$285,825		22.06%
	\$476,950	\$648,621	35.99%	\$412,973	42.53%	\$557,243		34.93%

Retail Market Power

Demand Growth Report	Columbia borough, PA			PA			Middletown borough, PA		
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth
Gasoline Stations-447	\$18,435,658	\$22,588,929	22.53%	\$16,287,709	\$19,507,583	19.77%			
Gasoline Stations with Convenience Stores-44711	\$14,061,042	\$17,108,584	21.67%	\$12,362,215	\$14,712,123	19.01%			
Other Gasoline Stations-44719	\$4,374,616	\$5,480,345	25.28%	\$3,925,494	\$4,795,460	22.16%			
Clothing & Clothing Accessories Stores-448	\$6,417,835	\$7,087,727	10.44%	\$5,594,328	\$6,005,445	7.35%			
Clothing Stores-4481	\$4,710,700	\$5,138,417	9.08%	\$4,135,301	\$4,382,619	5.98%			
Men's Clothing Stores-44811	\$335,647	\$366,413	9.17%	\$291,868	\$310,557	6.40%			
Women's Clothing Stores-44812	\$1,110,775	\$1,195,348	7.61%	\$995,871	\$1,035,438	3.97%			
Children's, Infants' Clothing Stores-44813	\$294,927	\$322,776	9.44%	\$245,091	\$263,978	7.71%			
Family Clothing Stores-44814	\$2,575,421	\$2,822,751	9.60%	\$2,252,842	\$2,401,784	6.61%			
Clothing Accessories Stores-44815	\$98,958	\$112,011	13.19%	\$85,731	\$94,210	9.89%			
Other Clothing Stores-44819	\$294,972	\$319,118	8.19%	\$263,898	\$276,652	4.83%			
Shoe Stores-4482	\$864,903	\$949,379	9.77%	\$755,712	\$806,415	6.71%			
Jewelry, Luggage, Leather Goods Stores-4483	\$842,232	\$999,931	18.72%	\$703,315	\$816,411	16.08%			
Jewelry Stores-44831	\$774,275	\$915,408	18.23%	\$645,512	\$746,420	15.63%			
Luggage and Leather Goods Stores-44832	\$67,957	\$84,523	24.38%	\$57,803	\$69,991	21.09%			
Sporting Goods, Hobby, Book, Music Stores-451	\$2,324,556	\$2,621,547	12.78%	\$2,414,778	\$2,622,771	8.61%			
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$1,605,801	\$1,819,215	13.29%	\$1,727,585	\$1,880,993	8.88%			
Sporting Goods Stores-45111	\$761,237	\$883,217	16.02%	\$910,159	\$1,001,052	9.99%			
Hobby, Toys & Games Stores-45112	\$555,149	\$614,900	10.76%	\$545,631	\$586,517	7.49%			
Sew/Needlework/Piece Goods Stores-45113	\$127,853	\$136,829	7.02%	\$123,832	\$129,890	4.89%			
Musical Instrument and Supplies Stores-45114	\$161,562	\$184,269	14.05%	\$147,963	\$163,534	10.52%			
Book, Periodical and Music Stores-4512	\$718,755	\$802,332	11.63%	\$687,193	\$741,778	7.94%			
Book Stores and News Dealers-45121	\$480,282	\$544,322	13.33%	\$464,458	\$508,178	9.41%			
Book Stores-451211	\$444,088	\$504,632	13.63%	\$431,787	\$473,118	9.57%			
News Dealers & Newsstands-451212	\$36,194	\$39,690	9.66%	\$32,671	\$35,060	7.31%			
Prerecorded Tapes, CDs, Record Stores-45122	\$238,473	\$258,010	8.19%	\$222,735	\$233,600	4.88%			
General Merchandise Stores-452	\$18,617,428	\$20,978,490	12.68%	\$16,250,479	\$17,924,681	10.30%			
Department Stores Excluding Leased Departments-4521	\$8,333,790	\$9,493,585	13.92%	\$7,369,239	\$8,195,819	11.22%			
Other General Merchandise Stores-4529	\$10,283,638	\$11,484,905	11.68%	\$8,881,240	\$9,728,862	9.54%			
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$9,987,423	11.40%	\$7,722,325	\$8,441,743	9.32%			
All Other General Merchandise Stores-45299	\$1,318,583	\$1,497,482	13.57%	\$1,158,915	\$1,287,119	11.06%			
Miscellaneous Store Retailers-453	\$3,999,212	\$4,443,503	11.11%	\$3,469,188	\$3,771,540	8.72%			
Florists-4531	\$269,186	\$301,680	12.07%	\$228,232	\$249,679	9.40%			
Office Supplies, Stationery, Gift Stores-4532	\$1,566,326	\$1,708,894	9.10%	\$1,364,735	\$1,456,639	6.73%			
Office Supplies, Stationery Stores-45321	\$891,445	\$974,489	9.32%	\$781,848	\$836,246	6.96%			
Gift, Novelty and Souvenir Stores-45322	\$674,881	\$734,405	8.82%	\$582,887	\$620,393	6.43%			
Used Merchandise Stores-4533	\$310,571	\$341,808	10.06%	\$272,405	\$292,214	7.27%			
Other Miscellaneous Store Retailers-4539	\$1,853,129	\$2,091,121	12.84%	\$1,603,816	\$1,773,008	10.55%			

Retail Market Power

Demand Growth Report	Columbia borough, PA			PA			Middletown borough, PA		
	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth	2008 Demand	2013 Demand	Percent Demand Growth
Non-Store Retailers-454									
Electronic Shopping, Mail-Order Houses-4541	\$11,600,568	\$12,531,946	8.03%	\$10,382,202	\$10,960,000	5.57%			
Vending Machine Operators-4542	\$6,317,629	\$7,297,601	15.51%	\$5,787,620	\$6,517,025	12.60%			
Direct Selling Establishments-4543	\$449,726	\$496,939	10.50%	\$363,729	\$394,019	8.33%			
	\$4,833,213	\$4,737,406	-1.98%	\$4,230,853	\$4,048,956	-4.30%			
Foodservice and Drinking Places-722									
Full-Service Restaurants-7221	\$16,363,711	\$20,158,731	23.19%	\$11,487,749	\$14,067,865	22.46%			
Limited Service Eating Places-7222	\$7,526,136	\$9,245,335	22.84%	\$5,254,007	\$6,421,310	22.22%			
Special Foodservices-7223	\$6,696,014	\$8,344,819	24.62%	\$4,751,642	\$5,874,650	23.63%			
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$1,693,381	23.89%	\$978,305	\$1,201,701	22.84%			
	\$774,749	\$875,196	12.97%	\$503,795	\$570,204	13.18%			

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Lancaster city, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$80,191,607	\$75,925,868	\$688,831,647	\$405,935,055	\$282,896,592
Motor Vehicle and Parts Dealers-441						
Automotive Dealers-4411	\$26,697,908	\$7,958,781	\$18,739,127	\$119,261,732	\$33,307,002	\$85,954,730
Other Motor Vehicle Dealers-4412	\$22,957,253	\$5,277,500	\$17,679,753	\$102,798,516	\$17,465,874	\$85,332,642
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,485,390	\$111,479	\$7,087,905	\$4,975,229	\$2,112,676
	\$2,143,786	\$1,195,891	\$947,895	\$9,375,311	\$10,865,899	(\$1,490,589)
Furniture and Home Furnishings Stores-442						
Furniture Stores-4421	\$3,455,747	\$109,393	\$3,346,354	\$13,871,280	\$13,269,344	\$601,937
Home Furnishing Stores-4422	\$1,909,834	\$0	\$1,909,834	\$7,903,182	\$6,585,883	\$1,317,299
	\$1,545,913	\$109,393	\$1,436,520	\$5,968,098	\$6,683,461	(\$715,363)
Electronics and Appliances Stores-443						
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$0	\$3,326,116	\$15,058,786	\$29,500,233	(\$14,441,447)
Household Appliances Stores-443111	\$2,537,766	\$0	\$2,537,766	\$11,544,904	\$23,258,826	(\$11,713,922)
Radio, Television, Electronics Stores-443112	\$579,382	\$0	\$579,382	\$2,421,815	\$20,953,070	(\$18,531,255)
Computer and Software Stores-44312	\$1,958,384	\$0	\$1,958,384	\$9,123,089	\$2,305,756	\$6,817,333
Camera and Photographic Equipment Stores-44313	\$652,901	\$0	\$652,901	\$2,950,613	\$3,719,408	(\$768,795)
	\$135,449	\$0	\$135,449	\$563,269	\$2,521,999	(\$1,958,730)
Building Material and Garden Equipment Stores-444						
Building Material and Supply Dealers-4441	\$15,744,499	\$0	\$15,744,499	\$60,632,441	\$36,575,249	\$24,057,192
Home Centers-44411	\$14,465,452	\$0	\$14,465,452	\$55,515,576	\$25,721,730	\$29,793,846
Paint and Wallpaper Stores-44412	\$5,733,335	\$0	\$5,733,335	\$21,983,040	\$2,037,894	\$19,945,146
Hardware Stores-44413	\$304,179	\$0	\$304,179	\$1,162,903	\$0	\$1,162,903
Other Building Materials Dealers-44419	\$1,180,167	\$0	\$1,180,167	\$4,707,949	\$2,422,306	\$2,285,643
Building Materials, Lumberyards-444191	\$7,247,771	\$0	\$7,247,771	\$27,661,684	\$21,261,530	\$6,400,154
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$0	\$2,473,216	\$9,175,412	\$7,250,414	\$1,924,998
Outdoor Power Equipment Stores-44421	\$1,279,047	\$0	\$1,279,047	\$5,116,865	\$10,853,519	(\$5,736,653)
Nursery and Garden Centers-44422	\$201,164	\$0	\$201,164	\$786,821	\$0	\$786,821
	\$1,077,883	\$0	\$1,077,883	\$4,330,044	\$10,853,519	(\$6,523,475)
Food and Beverage Stores-445						
Grocery Stores-4451	\$21,356,858	\$15,850,628	\$5,506,230	\$97,803,890	\$42,444,648	\$55,359,242
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$13,235,256	\$6,243,093	\$88,924,203	\$33,273,594	\$55,650,609
Convenience Stores-44512	\$18,443,120	\$12,656,564	\$5,786,556	\$84,412,955	\$30,822,760	\$53,590,195
Specialty Food Stores-4452	\$1,035,229	\$578,692	\$456,537	\$4,511,248	\$2,450,834	\$2,060,414
Beer, Wine and Liquor Stores-4453	\$623,913	\$51,031	\$572,882	\$2,967,879	\$711,906	\$2,255,973
	\$1,254,596	\$2,564,341	(\$1,309,745)	\$5,911,808	\$8,459,148	(\$2,547,340)
Health and Personal Care Stores-446						
	\$7,777,379	\$31,105,951	(\$23,328,572)	\$32,522,310	\$44,446,468	(\$11,924,158)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Lancaster city, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Pharmacies and Drug Stores-44611	\$6,774,054	\$31,105,951	(\$24,331,897)	\$28,305,841	\$39,864,377	(\$11,558,536)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$259,933	\$0	\$259,933	\$1,075,858	\$0	\$1,075,858
Optical Goods Stores-44613	\$266,442	\$0	\$266,442	\$1,125,636	\$1,563,414	(\$437,778)
Other Health and Personal Care Stores-44619	\$476,950	\$0	\$476,950	\$2,014,975	\$3,018,677	(\$1,003,702)
Gasoline Stations-447						
Gasoline Stations with Convenience Stores-44711	\$18,435,658	\$6,886,917	\$11,548,741	\$80,798,668	\$28,238,097	\$52,560,571
Other Gasoline Stations-44719	\$14,061,042	\$4,157,274	\$9,903,768	\$61,493,328	\$22,778,813	\$38,714,515
	\$4,374,616	\$2,729,643	\$1,644,973	\$19,305,340	\$5,459,284	\$13,846,056
Clothing & Clothing Accessories Stores-448						
Clothing Stores-4481	\$6,417,835	\$942,868	\$5,474,967	\$31,873,453	\$30,655,669	\$1,217,784
Men's Clothing Stores-44811	\$4,710,700	\$942,868	\$3,767,832	\$23,926,527	\$22,370,930	\$1,555,597
Women's Clothing Stores-44812	\$335,647	\$780,258	(\$444,611)	\$1,632,751	\$995,248	\$637,503
Children's, Infants' Clothing Stores-44813	\$1,110,775	\$162,610	\$948,165	\$5,887,829	\$7,201,635	(\$1,313,806)
Family Clothing Stores-44814	\$294,927	\$0	\$294,927	\$1,553,381	\$1,239,943	\$313,438
Clothing Accessories Stores-44815	\$2,575,421	\$0	\$2,575,421	\$12,868,756	\$7,237,457	\$5,631,299
Other Clothing Stores-44819	\$98,958	\$0	\$98,958	\$461,861	\$3,888,048	(\$3,426,187)
Shoe Stores-4482	\$294,972	\$0	\$294,972	\$1,521,949	\$1,808,599	(\$286,650)
Jewelry, Luggage, Leather Goods Stores-4483	\$864,903	\$0	\$864,903	\$4,584,815	\$1,575,474	\$3,009,341
Jewelry Stores-44831	\$842,232	\$0	\$842,232	\$3,362,111	\$6,709,265	(\$3,347,154)
Luggage and Leather Goods Stores-44832	\$774,275	\$0	\$774,275	\$3,086,314	\$6,709,265	(\$3,622,951)
	\$67,957	\$0	\$67,957	\$275,797	\$0	\$275,797
Sporting Goods, Hobby, Book, Music Stores-451						
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$2,324,556	\$1,471,284	\$853,272	\$11,447,871	\$9,410,769	\$2,037,103
Sporting Goods Stores-45111	\$1,605,801	\$863,239	\$742,562	\$7,276,621	\$2,899,930	\$4,376,691
Hobby, Toys & Games Stores-45112	\$761,237	\$334,213	\$427,024	\$3,574,783	\$1,869,044	\$1,705,739
Sew/Needlework/Piece Goods Stores-45113	\$555,149	\$0	\$555,149	\$2,370,407	\$773,550	\$1,596,857
Musical Instrument and Supplies Stores-45114	\$127,853	\$0	\$127,853	\$499,738	\$135,635	\$364,103
Book, Periodical and Music Stores-4512	\$161,562	\$529,026	(\$367,464)	\$831,693	\$121,701	\$709,992
Book Stores and News Dealers-45121	\$718,755	\$608,045	\$110,710	\$4,171,250	\$6,510,839	(\$2,339,589)
Book Stores-451211	\$480,282	\$608,045	(\$127,763)	\$2,961,638	\$1,841,515	\$1,120,123
News Dealers & Newsstands-451212	\$444,088	\$0	\$444,088	\$2,812,350	\$1,237,061	\$1,575,289
Prerecorded Tapes, CDs, Record Stores-45122	\$36,194	\$608,045	(\$571,851)	\$149,288	\$604,454	(\$455,166)
	\$238,473	\$0	\$238,473	\$1,209,612	\$4,669,324	(\$3,459,712)
General Merchandise Stores-452						
Department Stores Excluding Leased Departments-4521	\$18,617,428	\$1,417,245	\$17,200,183	\$84,896,722	\$11,137,615	\$73,759,107
Other General Merchandise Stores-4529	\$8,333,790	\$0	\$8,333,790	\$38,419,627	\$7,554,387	\$30,865,240
	\$10,283,638	\$1,417,245	\$8,866,393	\$46,477,095	\$3,583,228	\$42,893,867

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Lancaster city, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$0	\$8,965,055	\$40,802,836	\$0	\$40,802,836
All Other General Merchandise Stores-45299	\$1,318,583	\$1,417,245	(\$98,662)	\$5,674,259	\$3,583,228	\$2,091,031
Miscellaneous Store Retailers-453						
Florists-4531	\$3,999,212	\$3,196,613	\$802,599	\$15,884,604	\$17,917,779	(\$2,033,175)
Office Supplies, Stationery, Gift Stores-4532	\$269,186	\$467,733	(\$198,547)	\$1,065,650	\$2,228,908	(\$1,163,258)
Office Supplies, Stationery Stores-45321	\$1,566,326	\$320,854	\$1,245,472	\$5,920,353	\$6,497,460	(\$577,107)
Gift, Novelty and Souvenir Stores-45322	\$891,445	\$0	\$891,445	\$3,356,854	\$1,900,363	\$1,456,491
Used Merchandise Stores-4533	\$674,881	\$320,854	\$354,027	\$2,563,499	\$4,597,097	(\$2,033,598)
Other Miscellaneous Store Retailers-4539	\$310,571	\$669,207	(\$358,636)	\$1,360,546	\$1,822,237	(\$461,691)
	\$1,853,129	\$1,738,819	\$114,310	\$7,538,055	\$7,369,174	\$168,881
Non-Store Retailers-454						
Electronic Shopping, Mail-Order Houses-4541	\$11,600,568	\$0	\$11,600,568	\$51,649,846	\$26,722,708	\$24,927,138
Vending Machine Operators-4542	\$6,317,629	\$0	\$6,317,629	\$28,100,938	\$0	\$28,100,938
Direct Selling Establishments-4543	\$449,726	\$0	\$449,726	\$2,066,001	\$1,574,935	\$491,066
	\$4,833,213	\$0	\$4,833,213	\$21,482,907	\$25,147,773	(\$3,664,866)
Foodservice and Drinking Places-722						
Full-Service Restaurants-7221	\$16,363,711	\$11,251,927	\$5,111,784	\$73,130,044	\$82,309,474	(\$9,179,430)
Limited Service Eating Places-7222	\$7,526,136	\$451,416	\$7,074,720	\$33,514,539	\$50,483,745	(\$16,969,206)
Special Foodservices-7223	\$6,696,014	\$3,552,936	\$3,143,078	\$30,265,258	\$21,835,854	\$8,429,404
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$6,574,899	(\$5,208,087)	\$6,159,075	\$4,904,505	\$1,254,570
	\$774,749	\$672,676	\$102,073	\$3,191,172	\$5,085,370	(\$1,894,198)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Harrisburg city, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$80,191,607	\$75,925,868	\$597,670,349	\$627,886,511	(\$30,216,162)
Motor Vehicle and Parts Dealers-441						
Automotive Dealers-4411	\$26,697,908	\$7,958,781	\$18,739,127	\$115,618,345	\$252,137,092	(\$136,518,747)
Other Motor Vehicle Dealers-4412	\$22,957,253	\$5,277,500	\$17,679,753	\$100,179,353	\$230,597,571	(\$130,418,218)
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,485,390	\$111,479	\$7,501,911	\$4,500,213	\$3,001,698
	\$2,143,786	\$1,195,891	\$947,895	\$7,937,081	\$17,039,308	(\$9,102,227)
Furniture and Home Furnishings Stores-442						
Furniture Stores-4421	\$3,455,747	\$109,393	\$3,346,354	\$12,939,835	\$10,981,787	\$1,958,048
Home Furnishing Stores-4422	\$1,909,834	\$0	\$1,909,834	\$7,427,825	\$5,863,095	\$1,564,730
	\$1,545,913	\$109,393	\$1,436,520	\$5,512,010	\$5,118,692	\$393,318
Electronics and Appliances Stores-443						
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$0	\$3,326,116	\$13,876,437	\$15,333,616	(\$1,457,180)
Household Appliances Stores-443111	\$2,537,766	\$0	\$2,537,766	\$10,435,924	\$6,801,646	\$3,634,278
Radio, Television, Electronics Stores-443112	\$579,382	\$0	\$579,382	\$2,244,756	\$2,059,196	\$185,560
Computer and Software Stores-44312	\$1,958,384	\$0	\$1,958,384	\$8,191,168	\$4,742,450	\$3,448,718
Camera and Photographic Equipment Stores-44313	\$652,901	\$0	\$652,901	\$2,916,861	\$8,531,970	(\$5,615,109)
	\$135,449	\$0	\$135,449	\$523,652	\$0	\$523,652
Building Material and Garden Equipment Stores-444						
Building Material and Supply Dealers-4441	\$15,744,499	\$0	\$15,744,499	\$55,702,458	\$38,833,950	\$16,868,508
Home Centers-44411	\$14,465,452	\$0	\$14,465,452	\$50,940,187	\$38,156,296	\$12,783,891
Paint and Wallpaper Stores-44412	\$5,733,335	\$0	\$5,733,335	\$20,198,252	\$6,546,105	\$13,652,147
Hardware Stores-44413	\$304,179	\$0	\$304,179	\$1,074,509	\$251,913	\$822,596
Other Building Materials Dealers-44419	\$1,180,167	\$0	\$1,180,167	\$4,368,426	\$6,468,005	(\$2,099,579)
Building Materials, Lumberyards-444191	\$7,247,771	\$0	\$7,247,771	\$25,299,000	\$24,890,273	\$408,727
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$0	\$2,473,216	\$8,367,806	\$8,487,858	(\$120,053)
Outdoor Power Equipment Stores-44421	\$1,279,047	\$0	\$1,279,047	\$4,762,271	\$677,654	\$4,084,617
Nursery and Garden Centers-44422	\$201,164	\$0	\$201,164	\$715,557	\$0	\$715,557
	\$1,077,883	\$0	\$1,077,883	\$4,046,714	\$677,654	\$3,369,060
Food and Beverage Stores-445						
Grocery Stores-4451	\$21,356,858	\$15,850,628	\$5,506,230	\$80,650,716	\$37,179,008	\$43,471,708
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$13,235,256	\$6,243,093	\$74,197,264	\$29,744,473	\$44,452,791
Convenience Stores-44512	\$18,443,120	\$12,656,564	\$5,786,556	\$70,538,314	\$28,051,422	\$42,486,892
Specialty Food Stores-4452	\$1,035,229	\$578,692	\$456,537	\$3,658,950	\$1,693,051	\$1,965,899
Beer, Wine and Liquor Stores-4453	\$623,913	\$51,031	\$572,882	\$2,456,537	\$463,442	\$1,993,095
	\$1,254,596	\$2,564,341	(\$1,309,745)	\$3,996,915	\$6,971,093	(\$2,974,178)
Health and Personal Care Stores-446						
	\$7,777,379	\$31,105,951	(\$23,328,572)	\$29,551,690	\$39,882,628	(\$10,330,938)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Harrisburg city, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Pharmacies and Drug Stores-44611	\$6,774,054	\$31,105,951	(\$24,331,897)	\$25,631,379	\$34,936,286	(\$9,304,907)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$259,933	\$0	\$259,933	\$994,865	\$3,802,775	(\$2,807,910)
Optical Goods Stores-44613	\$266,442	\$0	\$266,442	\$1,094,342	\$327,449	\$766,893
Other Health and Personal Care Stores-44619	\$476,950	\$0	\$476,950	\$1,831,104	\$816,118	\$1,014,986
Gasoline Stations-447						
Gasoline Stations with Convenience Stores-44711	\$18,435,658	\$6,886,917	\$11,548,741	\$66,443,180	\$64,939,758	\$1,503,422
Other Gasoline Stations-44719	\$14,061,042	\$4,157,274	\$9,903,768	\$50,420,596	\$48,185,976	\$2,234,620
	\$4,374,616	\$2,729,643	\$1,644,973	\$16,022,584	\$16,753,781	(\$731,197)
Clothing & Clothing Accessories Stores-448						
Clothing Stores-4481	\$6,417,835	\$942,868	\$5,474,967	\$28,353,672	\$20,113,298	\$8,240,374
Men's Clothing Stores-44811	\$4,710,700	\$942,868	\$3,767,832	\$21,023,765	\$13,132,043	\$7,891,722
Women's Clothing Stores-44812	\$335,647	\$780,258	(\$444,611)	\$1,456,141	\$3,216,563	(\$1,760,422)
Children's, Infants' Clothing Stores-44813	\$1,110,775	\$162,610	\$948,165	\$5,045,943	\$2,748,955	\$2,296,988
Family Clothing Stores-44814	\$294,927	\$0	\$294,927	\$1,437,343	\$0	\$1,437,343
Clothing Accessories Stores-44815	\$2,575,421	\$0	\$2,575,421	\$11,333,532	\$3,749,330	\$7,584,202
Other Clothing Stores-44819	\$98,958	\$0	\$98,958	\$423,353	\$1,285,839	(\$862,486)
Shoe Stores-4482	\$294,972	\$0	\$294,972	\$1,327,453	\$2,131,356	(\$803,903)
Jewelry, Luggage, Leather Goods Stores-4483	\$864,903	\$0	\$864,903	\$3,977,311	\$3,677,682	\$299,629
Jewelry Stores-44831	\$842,232	\$0	\$842,232	\$3,352,596	\$3,303,573	\$49,023
Luggage and Leather Goods Stores-44832	\$774,275	\$0	\$774,275	\$3,094,385	\$3,303,573	(\$209,188)
	\$67,957	\$0	\$67,957	\$258,211	\$0	\$258,211
Sporting Goods, Hobby, Book, Music Stores-451						
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$2,324,556	\$1,471,284	\$853,272	\$11,431,083	\$13,942,433	(\$2,511,350)
Sporting Goods Stores-45111	\$1,605,801	\$863,239	\$742,562	\$8,264,971	\$4,369,005	\$3,895,966
Hobby, Toys & Games Stores-45112	\$761,237	\$334,213	\$427,024	\$4,545,183	\$1,626,347	\$2,918,836
Sew/Needlework/Piece Goods Stores-45113	\$555,149	\$0	\$555,149	\$2,499,399	\$2,742,658	(\$243,259)
Musical Instrument and Supplies Stores-45114	\$127,853	\$0	\$127,853	\$508,147	\$0	\$508,147
Book, Periodical and Music Stores-4512	\$161,562	\$529,026	(\$367,464)	\$712,242	\$0	\$712,242
Book Stores and News Dealers-45121	\$718,755	\$608,045	\$110,710	\$3,166,112	\$9,573,428	(\$6,407,316)
Book Stores-451211	\$480,282	\$608,045	(\$127,763)	\$2,109,879	\$4,063,980	(\$1,954,101)
News Dealers & Newsstands-451212	\$444,088	\$0	\$444,088	\$1,978,666	\$3,198,875	(\$1,220,209)
Prerecorded Tapes, CDs, Record Stores-45122	\$36,194	\$608,045	(\$571,851)	\$131,213	\$865,105	(\$733,892)
	\$238,473	\$0	\$238,473	\$1,056,233	\$5,509,448	(\$4,453,215)
General Merchandise Stores-452						
Department Stores Excluding Leased Departments-4521	\$18,617,428	\$1,417,245	\$17,200,183	\$75,431,966	\$29,806,223	\$45,625,743
Other General Merchandise Stores-4529	\$8,333,790	\$0	\$8,333,790	\$35,200,403	\$7,515,461	\$27,684,942
	\$10,283,638	\$1,417,245	\$8,866,393	\$40,231,563	\$22,290,762	\$17,940,801

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Harrisburg city, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$0	\$8,965,055	\$35,068,393	\$9,007,426	\$26,060,967
All Other General Merchandise Stores-45299	\$1,318,583	\$1,417,245	(\$98,662)	\$5,163,170	\$13,283,336	(\$8,120,166)
Miscellaneous Store Retailers-453						
Florists-4531	\$3,999,212	\$3,196,613	\$802,599	\$13,623,076	\$13,853,545	(\$230,469)
Office Supplies, Stationery, Gift Stores-4532	\$269,186	\$467,733	(\$198,547)	\$993,535	\$156,509	\$837,026
Office Supplies, Stationery Stores-45321	\$1,566,326	\$320,854	\$1,245,472	\$5,004,022	\$5,375,807	(\$371,785)
Gift, Novelty and Souvenir Stores-45322	\$891,445	\$0	\$891,445	\$2,855,526	\$650,700	\$2,204,826
Used Merchandise Stores-4533	\$674,881	\$320,854	\$354,027	\$2,148,496	\$4,725,107	(\$2,576,611)
Other Miscellaneous Store Retailers-4539	\$310,571	\$669,207	(\$358,636)	\$1,178,650	\$1,566,479	(\$387,829)
	\$1,853,129	\$1,738,819	\$114,310	\$6,446,869	\$6,754,750	(\$307,881)
Non-Store Retailers-454						
Electronic Shopping, Mail-Order Houses-4541	\$11,600,568	\$0	\$11,600,568	\$47,657,556	\$23,501,937	\$24,155,619
Vending Machine Operators-4542	\$6,317,629	\$0	\$6,317,629	\$25,967,588	\$17,750,216	\$8,217,372
Direct Selling Establishments-4543	\$449,726	\$0	\$449,726	\$1,633,930	\$185,067	\$1,448,863
	\$4,833,213	\$0	\$4,833,213	\$20,056,038	\$5,566,654	\$14,489,384
Foodservice and Drinking Places-722						
Full-Service Restaurants-7221	\$16,363,711	\$11,251,927	\$5,111,784	\$46,390,335	\$67,381,236	(\$20,990,901)
Limited Service Eating Places-7222	\$7,526,136	\$451,416	\$7,074,720	\$21,077,965	\$21,088,302	(\$10,337)
Special Foodservices-7223	\$6,696,014	\$3,552,936	\$3,143,078	\$19,510,492	\$32,267,368	(\$12,756,876)
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$6,574,899	(\$5,208,087)	\$4,023,478	\$6,900,721	(\$2,877,243)
	\$774,749	\$672,676	\$102,073	\$1,778,400	\$7,124,845	(\$5,346,445)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			York city, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$80,191,607	\$75,925,868	\$487,974,006	\$452,418,797	\$35,555,209
Motor Vehicle and Parts Dealers-441						
Automotive Dealers-4411	\$26,697,908	\$7,958,781	\$18,739,127	\$98,017,549	\$87,622,723	\$10,394,826
Other Motor Vehicle Dealers-4412	\$22,957,253	\$5,277,500	\$17,679,753	\$85,175,476	\$82,262,468	\$2,913,008
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,485,390	\$111,479	\$5,926,573	\$982,729	\$4,943,844
	\$2,143,786	\$1,195,891	\$947,895	\$6,915,500	\$4,377,526	\$2,537,974
Furniture and Home Furnishings Stores-442						
Furniture Stores-4421	\$3,455,747	\$109,393	\$3,346,354	\$9,688,709	\$15,529,932	(\$5,841,223)
Home Furnishing Stores-4422	\$1,909,834	\$0	\$1,909,834	\$5,577,007	\$10,483,803	(\$4,906,796)
	\$1,545,913	\$109,393	\$1,436,520	\$4,111,702	\$5,046,129	(\$934,427)
Electronics and Appliances Stores-443						
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$0	\$3,326,116	\$10,577,962	\$8,748,354	\$1,829,608
Household Appliances Stores-443111	\$2,537,766	\$0	\$2,537,766	\$8,051,085	\$7,064,624	\$986,461
Radio, Television, Electronics Stores-443112	\$579,382	\$0	\$579,382	\$1,748,553	\$1,161,914	\$586,639
Computer and Software Stores-44312	\$1,958,384	\$0	\$1,958,384	\$6,302,532	\$5,902,710	\$399,822
Camera and Photographic Equipment Stores-44313	\$652,901	\$0	\$652,901	\$2,140,584	\$1,683,730	\$456,854
	\$135,449	\$0	\$135,449	\$386,293	\$0	\$386,293
Building Material and Garden Equipment Stores-444						
Building Material and Supply Dealers-4441	\$15,744,499	\$0	\$15,744,499	\$43,986,817	\$10,652,539	\$33,334,278
Home Centers-44411	\$14,465,452	\$0	\$14,465,452	\$40,292,909	\$10,652,539	\$29,640,370
Paint and Wallpaper Stores-44412	\$5,733,335	\$0	\$5,733,335	\$15,926,504	\$5,014,068	\$10,912,436
Hardware Stores-44413	\$304,179	\$0	\$304,179	\$817,042	\$0	\$817,042
Other Building Materials Dealers-44419	\$1,180,167	\$0	\$1,180,167	\$3,415,304	\$0	\$3,415,304
Building Materials, Lumberyards-444191	\$7,247,771	\$0	\$7,247,771	\$20,134,059	\$5,638,471	\$14,495,588
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$0	\$2,473,216	\$6,603,707	\$1,922,785	\$4,680,922
Outdoor Power Equipment Stores-44421	\$1,279,047	\$0	\$1,279,047	\$3,693,908	\$0	\$3,693,908
Nursery and Garden Centers-44422	\$201,164	\$0	\$201,164	\$566,069	\$0	\$566,069
	\$1,077,883	\$0	\$1,077,883	\$3,127,839	\$0	\$3,127,839
Food and Beverage Stores-445						
Grocery Stores-4451	\$21,356,858	\$15,850,628	\$5,506,230	\$67,792,676	\$27,149,603	\$40,643,073
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$13,235,256	\$6,243,093	\$62,408,193	\$21,371,547	\$41,036,646
Convenience Stores-44512	\$18,443,120	\$12,656,564	\$5,786,556	\$59,247,669	\$18,529,183	\$40,718,486
Specialty Food Stores-4452	\$1,035,229	\$578,692	\$456,537	\$3,160,524	\$2,842,364	\$318,160
Beer, Wine and Liquor Stores-4453	\$623,913	\$51,031	\$572,882	\$2,052,803	\$1,533,448	\$519,355
	\$1,254,596	\$2,564,341	(\$1,309,745)	\$3,331,680	\$4,244,608	(\$912,928)
Health and Personal Care Stores-446						
	\$7,777,379	\$31,105,951	(\$23,328,572)	\$23,397,215	\$32,288,413	(\$8,891,198)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			York city, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Pharmacies and Drug Stores-44611	\$6,774,054	\$31,105,951	(\$24,331,897)	\$20,384,942	\$31,646,043	(\$11,261,101)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$259,933	\$0	\$259,933	\$781,046	\$239,446	\$541,600
Optical Goods Stores-44613	\$266,442	\$0	\$266,442	\$776,441	\$160,524	\$615,917
Other Health and Personal Care Stores-44619	\$476,950	\$0	\$476,950	\$1,454,786	\$242,400	\$1,212,386
Gasoline Stations-447						
Gasoline Stations with Convenience Stores-44711	\$18,435,658	\$6,886,917	\$11,548,741	\$56,891,246	\$69,170,422	(\$12,279,176)
Other Gasoline Stations-44719	\$14,061,042	\$4,157,274	\$9,903,768	\$43,279,536	\$38,726,592	\$4,552,944
	\$4,374,616	\$2,729,643	\$1,644,973	\$13,611,710	\$30,443,830	(\$16,832,120)
Clothing & Clothing Accessories Stores-448						
Clothing Stores-4481	\$6,417,835	\$942,868	\$5,474,967	\$21,622,795	\$9,266,718	\$12,356,077
Men's Clothing Stores-44811	\$4,710,700	\$942,868	\$3,767,832	\$16,313,298	\$5,766,830	\$10,546,468
Women's Clothing Stores-44812	\$335,647	\$780,258	(\$444,611)	\$1,148,389	\$266,779	\$881,610
Children's, Infants' Clothing Stores-44813	\$1,110,775	\$162,610	\$948,165	\$3,869,674	\$1,908,681	\$1,960,993
Family Clothing Stores-44814	\$294,927	\$0	\$294,927	\$1,140,328	\$406,606	\$733,722
Clothing Accessories Stores-44815	\$2,575,421	\$0	\$2,575,421	\$8,822,365	\$2,234,120	\$6,588,245
Other Clothing Stores-44819	\$98,958	\$0	\$98,958	\$301,617	\$36,172	\$265,445
Shoe Stores-4482	\$294,972	\$0	\$294,972	\$1,030,925	\$914,472	\$116,453
Jewelry, Luggage, Leather Goods Stores-4483	\$864,903	\$0	\$864,903	\$3,182,286	\$1,822,536	\$1,359,750
Jewelry Stores-44831	\$842,232	\$0	\$842,232	\$2,127,211	\$1,677,352	\$449,859
Luggage and Leather Goods Stores-44832	\$774,275	\$0	\$774,275	\$1,949,890	\$1,677,352	\$272,538
	\$67,957	\$0	\$67,957	\$177,321	\$0	\$177,321
Sporting Goods, Hobby, Book, Music Stores-451						
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$2,324,556	\$1,471,284	\$853,272	\$8,717,515	\$6,251,362	\$2,466,153
Sporting Goods Stores-45111	\$1,605,801	\$863,239	\$742,562	\$6,281,804	\$4,381,846	\$1,899,958
Hobby, Toys & Games Stores-45112	\$761,237	\$334,213	\$427,024	\$3,404,142	\$2,555,911	\$848,231
Sew/Needlework/Piece Goods Stores-45113	\$555,149	\$0	\$555,149	\$1,919,765	\$962,556	\$957,209
Musical Instrument and Supplies Stores-45114	\$127,853	\$0	\$127,853	\$401,758	\$190,779	\$210,979
Book, Periodical and Music Stores-4512	\$161,562	\$529,026	(\$367,464)	\$556,139	\$672,600	(\$116,461)
Book Stores and News Dealers-45121	\$718,755	\$608,045	\$110,710	\$2,435,711	\$1,869,516	\$566,195
Book Stores-451211	\$480,282	\$608,045	(\$127,763)	\$1,619,852	\$1,869,516	(\$249,664)
News Dealers & Newsstands-451212	\$444,088	\$0	\$444,088	\$1,513,612	\$580,268	\$933,344
Prerecorded Tapes, CDs, Record Stores-45122	\$36,194	\$608,045	(\$571,851)	\$106,240	\$1,289,248	(\$1,183,008)
	\$238,473	\$0	\$238,473	\$815,859	\$0	\$815,859
General Merchandise Stores-452						
Department Stores Excluding Leased Departments-4521	\$18,617,428	\$1,417,245	\$17,200,183	\$60,423,551	\$15,856,950	\$44,566,601
Other General Merchandise Stores-4529	\$8,333,790	\$0	\$8,333,790	\$27,441,288	\$0	\$27,441,288
	\$10,283,638	\$1,417,245	\$8,866,393	\$32,982,263	\$15,856,950	\$17,125,313

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			York city, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$0	\$8,965,055	\$28,915,983	\$10,548,602	\$18,367,381
All Other General Merchandise Stores-45299	\$1,318,583	\$1,417,245	(\$98,662)	\$4,066,280	\$5,308,348	(\$1,242,068)
Miscellaneous Store Retailers-453						
Florists-4531	\$3,999,212	\$3,196,613	\$802,599	\$11,035,034	\$30,666,196	(\$19,631,162)
Office Supplies, Stationery, Gift Stores-4532	\$269,186	\$467,733	(\$198,547)	\$747,958	\$2,051,087	(\$1,303,129)
Office Supplies, Stationery Stores-45321	\$1,566,326	\$320,854	\$1,245,472	\$4,053,094	\$13,998,761	(\$9,945,667)
Gift, Novelty and Souvenir Stores-45322	\$891,445	\$0	\$891,445	\$2,311,339	\$13,507,047	(\$11,195,708)
Used Merchandise Stores-4533	\$674,881	\$320,854	\$354,027	\$1,741,755	\$491,714	\$1,250,041
Other Miscellaneous Store Retailers-4539	\$310,571	\$669,207	(\$358,636)	\$922,659	\$1,109,774	(\$187,115)
	\$1,853,129	\$1,738,819	\$114,310	\$5,311,323	\$13,506,574	(\$8,195,251)
Non-Store Retailers-454						
Electronic Shopping, Mail-Order Houses-4541	\$11,600,568	\$0	\$11,600,568	\$37,411,029	\$92,577,949	(\$55,166,920)
Vending Machine Operators-4542	\$6,317,629	\$0	\$6,317,629	\$19,865,571	\$0	\$19,865,571
Direct Selling Establishments-4543	\$449,726	\$0	\$449,726	\$1,384,289	\$243,520	\$1,140,769
	\$4,833,213	\$0	\$4,833,213	\$16,161,169	\$92,334,429	(\$76,173,260)
Foodservice and Drinking Places-722						
Full-Service Restaurants-7221	\$16,363,711	\$11,251,927	\$5,111,784	\$38,411,908	\$46,637,636	(\$8,225,728)
Limited Service Eating Places-7222	\$7,526,136	\$451,416	\$7,074,720	\$17,428,160	\$15,527,086	\$1,901,074
Special Foodservices-7223	\$6,696,014	\$3,552,936	\$3,143,078	\$16,231,068	\$16,857,948	(\$626,880)
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$6,574,899	(\$5,208,087)	\$3,337,190	\$6,128,549	(\$2,791,359)
	\$774,749	\$672,676	\$102,073	\$1,415,490	\$8,124,053	(\$6,708,563)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Lititz borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$80,191,607	\$75,925,868	\$152,382,912	\$130,456,876	\$21,926,036
Motor Vehicle and Parts Dealers-441						
Automotive Dealers-4411	\$26,697,908	\$7,958,781	\$18,739,127	\$27,019,757	\$23,651,489	\$3,368,268
Other Motor Vehicle Dealers-4412	\$22,957,253	\$5,277,500	\$17,679,753	\$23,189,822	\$21,515,967	\$1,673,855
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,485,390	\$111,479	\$1,610,642	\$0	\$1,610,642
	\$2,143,786	\$1,195,891	\$947,895	\$2,219,293	\$2,135,522	\$83,771
Furniture and Home Furnishings Stores-442						
Furniture Stores-4421	\$3,455,747	\$109,393	\$3,346,354	\$3,501,399	\$2,296,723	\$1,204,676
Home Furnishing Stores-4422	\$1,909,834	\$0	\$1,909,834	\$1,922,950	\$1,640,369	\$282,581
	\$1,545,913	\$109,393	\$1,436,520	\$1,578,449	\$656,354	\$922,095
Electronics and Appliances Stores-443						
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$0	\$3,326,116	\$3,281,539	\$1,961,870	\$1,319,669
Household Appliances Stores-443111	\$2,537,766	\$0	\$2,537,766	\$2,488,835	\$1,961,870	\$526,965
Radio, Television, Electronics Stores-443112	\$579,382	\$0	\$579,382	\$566,789	\$0	\$566,789
Computer and Software Stores-44312	\$1,958,384	\$0	\$1,958,384	\$1,922,046	\$1,961,870	(\$39,824)
Camera and Photographic Equipment Stores-44313	\$652,901	\$0	\$652,901	\$656,099	\$0	\$656,099
	\$135,449	\$0	\$135,449	\$136,605	\$0	\$136,605
Building Material and Garden Equipment Stores-444						
Building Material and Supply Dealers-4441	\$15,744,499	\$0	\$15,744,499	\$15,660,219	\$6,132,712	\$9,527,507
Home Centers-44411	\$14,465,452	\$0	\$14,465,452	\$14,396,778	\$4,002,340	\$10,394,438
Paint and Wallpaper Stores-44412	\$5,733,335	\$0	\$5,733,335	\$5,693,722	\$2,920,450	\$2,773,272
Hardware Stores-44413	\$304,179	\$0	\$304,179	\$306,376	\$0	\$306,376
Other Building Materials Dealers-44419	\$1,180,167	\$0	\$1,180,167	\$1,167,656	\$0	\$1,167,656
Building Materials, Lumberyards-444191	\$7,247,771	\$0	\$7,247,771	\$7,229,024	\$1,081,890	\$6,147,134
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$0	\$2,473,216	\$2,469,154	\$368,938	\$2,100,216
Outdoor Power Equipment Stores-44421	\$1,279,047	\$0	\$1,279,047	\$1,263,441	\$2,130,372	(\$866,931)
Nursery and Garden Centers-44422	\$201,164	\$0	\$201,164	\$198,147	\$0	\$198,147
	\$1,077,883	\$0	\$1,077,883	\$1,065,294	\$2,130,372	(\$1,065,078)
Food and Beverage Stores-445						
Grocery Stores-4451	\$21,356,858	\$15,850,628	\$5,506,230	\$19,889,732	\$6,842,987	\$13,046,745
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$13,235,256	\$6,243,093	\$18,113,706	\$5,873,435	\$12,240,271
Convenience Stores-44512	\$18,443,120	\$12,656,564	\$5,786,556	\$17,168,901	\$5,507,951	\$11,660,950
Specialty Food Stores-4452	\$1,035,229	\$578,692	\$456,537	\$944,805	\$365,484	\$579,321
Beer, Wine and Liquor Stores-4453	\$623,913	\$51,031	\$572,882	\$576,648	\$969,552	(\$392,904)
	\$1,254,596	\$2,564,341	(\$1,309,745)	\$1,199,378	\$0	\$1,199,378
Health and Personal Care Stores-446						
	\$7,777,379	\$31,105,951	(\$23,328,572)	\$7,594,122	\$11,992,654	(\$4,398,532)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Lititz borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Pharmacies and Drug Stores-44611	\$6,774,054	\$31,105,951	(\$24,331,897)	\$6,604,759	\$11,992,654	(\$5,387,896)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$259,933	\$0	\$259,933	\$255,873	\$0	\$255,873
Optical Goods Stores-44613	\$266,442	\$0	\$266,442	\$268,171	\$0	\$268,171
Other Health and Personal Care Stores-44619	\$476,950	\$0	\$476,950	\$465,319	\$0	\$465,319
Gasoline Stations-447						
Gasoline Stations with Convenience Stores-44711	\$18,435,658	\$6,886,917	\$11,548,741	\$17,936,983	\$31,179,562	(\$13,242,579)
Other Gasoline Stations-44719	\$14,061,042	\$4,157,274	\$9,903,768	\$13,575,791	\$31,179,562	(\$17,603,771)
	\$4,374,616	\$2,729,643	\$1,644,973	\$4,361,192	\$0	\$4,361,192
Clothing & Clothing Accessories Stores-448						
Clothing Stores-4481	\$6,417,835	\$942,868	\$5,474,967	\$6,245,880	\$2,744,997	\$3,500,883
Men's Clothing Stores-44811	\$4,710,700	\$942,868	\$3,767,832	\$4,559,371	\$1,825,959	\$2,733,412
Women's Clothing Stores-44812	\$335,647	\$780,258	(\$444,611)	\$316,324	\$0	\$316,324
Children's, Infants' Clothing Stores-44813	\$1,110,775	\$162,610	\$948,165	\$1,096,444	\$1,626,107	(\$529,663)
Family Clothing Stores-44814	\$294,927	\$0	\$294,927	\$273,823	\$199,852	\$73,971
Clothing Accessories Stores-44815	\$2,575,421	\$0	\$2,575,421	\$2,486,289	\$0	\$2,486,289
Other Clothing Stores-44819	\$98,958	\$0	\$98,958	\$99,706	\$0	\$99,706
Shoe Stores-4482	\$294,972	\$0	\$294,972	\$286,785	\$0	\$286,785
Jewelry, Luggage, Leather Goods Stores-4483	\$864,903	\$0	\$864,903	\$808,288	\$0	\$808,288
Jewelry Stores-44831	\$842,232	\$0	\$842,232	\$878,221	\$919,038	(\$40,817)
Luggage and Leather Goods Stores-44832	\$774,275	\$0	\$774,275	\$806,953	\$919,038	(\$112,085)
	\$67,957	\$0	\$67,957	\$71,268	\$0	\$71,268
Sporting Goods, Hobby, Book, Music Stores-451						
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$2,324,556	\$1,471,284	\$853,272	\$2,404,535	\$3,222,522	(\$817,987)
Sporting Goods Stores-45111	\$1,605,801	\$863,239	\$742,562	\$1,628,352	\$3,111,608	(\$1,483,256)
Hobby, Toys & Games Stores-45112	\$761,237	\$334,213	\$427,024	\$778,987	\$0	\$778,987
Sew/Needlework/Piece Goods Stores-45113	\$555,149	\$0	\$555,149	\$558,383	\$3,005,803	(\$2,447,420)
Musical Instrument and Supplies Stores-45114	\$127,853	\$0	\$127,853	\$131,522	\$0	\$131,522
Book, Periodical and Music Stores-4512	\$161,562	\$529,026	(\$367,464)	\$159,460	\$105,805	\$53,655
Book Stores and News Dealers-45121	\$718,755	\$608,045	\$110,710	\$776,183	\$110,914	\$665,269
Book Stores-451211	\$480,282	\$608,045	(\$127,763)	\$545,170	\$110,914	\$434,256
News Dealers & Newsstands-451212	\$444,088	\$0	\$444,088	\$508,998	\$110,914	\$398,084
Prerecorded Tapes, CDs, Record Stores-45122	\$36,194	\$608,045	(\$571,851)	\$36,172	\$0	\$36,172
	\$238,473	\$0	\$238,473	\$231,013	\$0	\$231,013
General Merchandise Stores-452						
Department Stores Excluding Leased Departments-4521	\$18,617,428	\$1,417,245	\$17,200,183	\$17,922,950	\$26,844,475	(\$8,921,525)
Other General Merchandise Stores-4529	\$8,333,790	\$0	\$8,333,790	\$8,126,418	\$93,931	\$8,032,487
	\$10,283,638	\$1,417,245	\$8,866,393	\$9,796,532	\$26,750,544	(\$16,954,012)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Lititz borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$0	\$8,965,055	\$8,498,330	\$0	\$8,498,330
All Other General Merchandise Stores-45299	\$1,318,583	\$1,417,245	(\$98,662)	\$1,298,202	\$26,750,544	(\$25,452,342)
Miscellaneous Store Retailers-453						
Florists-4531	\$3,999,212	\$3,196,613	\$802,599	\$3,937,413	\$7,554,918	(\$3,617,505)
Office Supplies, Stationery, Gift Stores-4532	\$269,186	\$467,733	(\$198,547)	\$269,155	\$654,829	(\$385,674)
Office Supplies, Stationery Stores-45321	\$1,566,326	\$320,854	\$1,245,472	\$1,571,875	\$3,465,217	(\$1,893,342)
Gift, Novelty and Souvenir Stores-45322	\$891,445	\$0	\$891,445	\$893,610	\$0	\$893,610
Used Merchandise Stores-4533	\$674,881	\$320,854	\$354,027	\$678,265	\$3,465,217	(\$2,786,952)
Other Miscellaneous Store Retailers-4539	\$310,571	\$669,207	(\$358,636)	\$311,539	\$2,855,266	(\$2,543,727)
	\$1,853,129	\$1,738,819	\$114,310	\$1,784,844	\$579,606	\$1,205,238
Non-Store Retailers-454						
Electronic Shopping, Mail-Order Houses-4541	\$11,600,568	\$0	\$11,600,568	\$11,229,620	\$3,642,652	\$7,586,968
Vending Machine Operators-4542	\$6,317,629	\$0	\$6,317,629	\$6,311,438	\$0	\$6,311,438
Direct Selling Establishments-4543	\$449,726	\$0	\$449,726	\$417,399	\$219,347	\$198,052
	\$4,833,213	\$0	\$4,833,213	\$4,500,783	\$3,423,305	\$1,077,478
Foodservice and Drinking Places-722						
Full-Service Restaurants-7221	\$16,363,711	\$11,251,927	\$5,111,784	\$15,758,763	\$2,389,315	\$13,369,448
Limited Service Eating Places-7222	\$7,526,136	\$451,416	\$7,074,720	\$7,255,323	\$601,889	\$6,653,434
Special Foodservices-7223	\$6,696,014	\$3,552,936	\$3,143,078	\$6,428,680	\$1,619,256	\$4,809,424
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$6,574,899	(\$5,208,087)	\$1,314,252	\$0	\$1,314,252
	\$774,749	\$672,676	\$102,073	\$760,508	\$168,170	\$592,338

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Elizabethtown borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$80,191,607	\$75,925,868	\$190,739,669	\$40,555,486	\$150,184,183
Motor Vehicle and Parts Dealers-441						
Automotive Dealers-4411	\$26,697,908	\$7,958,781	\$18,739,127	\$34,832,958	\$3,871,005	\$30,961,953
Other Motor Vehicle Dealers-4412	\$22,957,253	\$5,277,500	\$17,679,753	\$29,820,228	\$811,923	\$29,008,305
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,485,390	\$111,479	\$2,120,497	\$848,795	\$1,271,702
	\$2,143,786	\$1,195,891	\$947,895	\$2,892,233	\$2,210,287	\$681,946
Furniture and Home Furnishings Stores-442						
Furniture Stores-4421	\$3,455,747	\$109,393	\$3,346,354	\$4,214,197	\$1,388,002	\$2,826,195
Home Furnishing Stores-4422	\$1,909,834	\$0	\$1,909,834	\$2,292,864	\$1,388,002	\$904,862
	\$1,545,913	\$109,393	\$1,436,520	\$1,921,333	\$0	\$1,921,333
Electronics and Appliances Stores-443						
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$0	\$3,326,116	\$4,469,208	\$5,163,629	(\$694,421)
Household Appliances Stores-443111	\$2,537,766	\$0	\$2,537,766	\$3,300,102	\$4,155,676	(\$855,574)
Radio, Television, Electronics Stores-443112	\$579,382	\$0	\$579,382	\$683,010	\$967,633	(\$284,623)
Computer and Software Stores-44312	\$1,958,384	\$0	\$1,958,384	\$2,617,092	\$3,188,043	(\$570,951)
Camera and Photographic Equipment Stores-44313	\$652,901	\$0	\$652,901	\$986,580	\$1,007,953	(\$21,373)
	\$135,449	\$0	\$135,449	\$182,526	\$0	\$182,526
Building Material and Garden Equipment Stores-444						
Building Material and Supply Dealers-4441	\$15,744,499	\$0	\$15,744,499	\$18,291,067	\$12,712,222	\$5,578,845
Home Centers-44411	\$14,465,452	\$0	\$14,465,452	\$16,810,390	\$12,712,222	\$4,098,168
Paint and Wallpaper Stores-44412	\$5,733,335	\$0	\$5,733,335	\$6,654,294	\$0	\$6,654,294
Hardware Stores-44413	\$304,179	\$0	\$304,179	\$360,023	\$0	\$360,023
Other Building Materials Dealers-44419	\$1,180,167	\$0	\$1,180,167	\$1,393,562	\$0	\$1,393,562
Building Materials, Lumberyards-444191	\$7,247,771	\$0	\$7,247,771	\$8,402,511	\$12,712,222	(\$4,309,711)
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$0	\$2,473,216	\$2,871,216	\$4,335,012	(\$1,463,796)
Outdoor Power Equipment Stores-44421	\$1,279,047	\$0	\$1,279,047	\$1,480,677	\$0	\$1,480,677
Nursery and Garden Centers-44422	\$201,164	\$0	\$201,164	\$228,693	\$0	\$228,693
	\$1,077,883	\$0	\$1,077,883	\$1,251,984	\$0	\$1,251,984
Food and Beverage Stores-445						
Grocery Stores-4451	\$21,356,858	\$15,850,628	\$5,506,230	\$23,467,126	\$954,582	\$22,512,544
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$13,235,256	\$6,243,093	\$21,206,066	\$578,684	\$20,627,382
Convenience Stores-44512	\$18,443,120	\$12,656,564	\$5,786,556	\$20,061,718	\$0	\$20,061,718
Specialty Food Stores-4452	\$1,035,229	\$578,692	\$456,537	\$1,144,348	\$578,684	\$565,664
Beer, Wine and Liquor Stores-4453	\$623,913	\$51,031	\$572,882	\$671,893	\$375,898	\$295,995
	\$1,254,596	\$2,564,341	(\$1,309,745)	\$1,589,167	\$0	\$1,589,167
Health and Personal Care Stores-446						
	\$7,777,379	\$31,105,951	(\$23,328,572)	\$8,526,981	\$203,924	\$8,323,057

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Elizabethtown borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Pharmacies and Drug Stores-44611	\$6,774,054	\$31,105,951	(\$24,331,897)	\$7,413,693	\$0	\$7,413,693
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$259,933	\$0	\$259,933	\$281,161	\$0	\$281,161
Optical Goods Stores-44613	\$266,442	\$0	\$266,442	\$317,996	\$203,924	\$114,072
Other Health and Personal Care Stores-44619	\$476,950	\$0	\$476,950	\$514,131	\$0	\$514,131
Gasoline Stations-447						
Gasoline Stations with Convenience Stores-44711	\$18,435,658	\$6,886,917	\$11,548,741	\$21,621,525	\$6,393,528	\$15,227,997
Other Gasoline Stations-44719	\$14,061,042	\$4,157,274	\$9,903,768	\$16,370,085	\$3,117,955	\$13,252,130
	\$4,374,616	\$2,729,643	\$1,644,973	\$5,251,440	\$3,275,573	\$1,975,867
Clothing & Clothing Accessories Stores-448						
Clothing Stores-4481	\$6,417,835	\$942,868	\$5,474,967	\$8,920,405	\$684,790	\$8,235,615
Men's Clothing Stores-44811	\$4,710,700	\$942,868	\$3,767,832	\$6,610,339	\$290,917	\$6,319,422
Women's Clothing Stores-44812	\$335,647	\$780,258	(\$444,611)	\$442,428	\$0	\$442,428
Children's, Infants' Clothing Stores-44813	\$1,110,775	\$162,610	\$948,165	\$1,724,039	\$162,610	\$1,561,429
Family Clothing Stores-44814	\$294,927	\$0	\$294,927	\$317,255	\$0	\$317,255
Clothing Accessories Stores-44815	\$2,575,421	\$0	\$2,575,421	\$3,550,166	\$0	\$3,550,166
Other Clothing Stores-44819	\$98,958	\$0	\$98,958	\$142,005	\$0	\$142,005
Shoe Stores-4482	\$294,972	\$0	\$294,972	\$434,446	\$128,307	\$306,139
Jewelry, Luggage, Leather Goods Stores-4483	\$864,903	\$0	\$864,903	\$1,174,180	\$0	\$1,174,180
Jewelry Stores-44831	\$842,232	\$0	\$842,232	\$1,135,886	\$393,873	\$742,013
Luggage and Leather Goods Stores-44832	\$774,275	\$0	\$774,275	\$1,041,280	\$393,873	\$647,407
	\$67,957	\$0	\$67,957	\$94,606	\$0	\$94,606
Sporting Goods, Hobby, Book, Music Stores-451						
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$2,324,556	\$1,471,284	\$853,272	\$3,937,043	\$1,467,369	\$2,469,674
Sporting Goods Stores-45111	\$1,605,801	\$863,239	\$742,562	\$2,234,718	\$1,269,593	\$965,125
Hobby, Toys & Games Stores-45112	\$761,237	\$334,213	\$427,024	\$1,118,130	\$668,432	\$449,698
Sew/Needlework/Piece Goods Stores-45113	\$555,149	\$0	\$555,149	\$710,983	\$601,161	\$109,822
Musical Instrument and Supplies Stores-45114	\$127,853	\$0	\$127,853	\$166,291	\$0	\$166,291
Book, Periodical and Music Stores-4512	\$161,562	\$529,026	(\$367,464)	\$239,314	\$0	\$239,314
Book Stores and News Dealers-45121	\$718,755	\$608,045	\$110,710	\$1,702,325	\$197,776	\$1,504,549
Book Stores-451211	\$480,282	\$608,045	(\$127,763)	\$1,323,416	\$197,776	\$1,125,640
News Dealers & Newsstands-451212	\$444,088	\$0	\$444,088	\$1,277,484	\$110,914	\$1,166,570
Prerecorded Tapes, CDs, Record Stores-45122	\$36,194	\$608,045	(\$571,851)	\$45,932	\$86,862	(\$40,930)
	\$238,473	\$0	\$238,473	\$378,909	\$0	\$378,909
General Merchandise Stores-452						
Department Stores Excluding Leased Departments-4521	\$18,617,428	\$1,417,245	\$17,200,183	\$22,780,168	\$0	\$22,780,168
Other General Merchandise Stores-4529	\$8,333,790	\$0	\$8,333,790	\$10,626,423	\$0	\$10,626,423
	\$10,283,638	\$1,417,245	\$8,866,393	\$12,153,745	\$0	\$12,153,745

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Elizabethtown borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$0	\$8,965,055	\$10,524,518	\$0	\$10,524,518
All Other General Merchandise Stores-45299	\$1,318,583	\$1,417,245	(\$98,662)	\$1,629,227	\$0	\$1,629,227
Miscellaneous Store Retailers-453						
Florists-4531	\$3,999,212	\$3,196,613	\$802,599	\$4,986,924	\$3,022,037	\$1,964,887
Office Supplies, Stationery, Gift Stores-4532	\$269,186	\$467,733	(\$198,547)	\$326,313	\$420,961	(\$94,648)
Office Supplies, Stationery Stores-45321	\$1,566,326	\$320,854	\$1,245,472	\$2,011,633	\$441,824	\$1,569,809
Gift, Novelty and Souvenir Stores-45322	\$891,445	\$0	\$891,445	\$1,148,313	\$441,824	\$706,489
Used Merchandise Stores-4533	\$674,881	\$320,854	\$354,027	\$863,320	\$0	\$863,320
Other Miscellaneous Store Retailers-4539	\$310,571	\$669,207	(\$358,636)	\$434,160	\$89,229	\$344,931
	\$1,853,129	\$1,738,819	\$114,310	\$2,214,818	\$2,070,023	\$144,795
Non-Store Retailers-454						
Electronic Shoppng, Mail-Order Houses-4541	\$11,600,568	\$0	\$11,600,568	\$14,600,084	\$0	\$14,600,084
Vending Machine Operators-4542	\$6,317,629	\$0	\$6,317,629	\$8,812,567	\$0	\$8,812,567
Direct Selling Establishments-4543	\$449,726	\$0	\$449,726	\$497,499	\$0	\$497,499
	\$4,833,213	\$0	\$4,833,213	\$5,290,018	\$0	\$5,290,018
Foodservice and Drinking Places-722						
Full-Service Restaurants-7221	\$16,363,711	\$11,251,927	\$5,111,784	\$20,091,983	\$4,694,398	\$15,397,585
Limited Service Eating Places-7222	\$7,526,136	\$451,416	\$7,074,720	\$9,253,094	\$752,362	\$8,500,732
Special Foodservices-7223	\$6,696,014	\$3,552,936	\$3,143,078	\$8,196,230	\$3,942,036	\$4,254,195
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$6,574,899	(\$5,208,087)	\$1,674,381	\$0	\$1,674,381
	\$774,749	\$672,676	\$102,073	\$968,278	\$0	\$968,278

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Mount Joy borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$80,191,607	\$75,925,868	\$130,355,333	\$149,252,587	(\$18,897,254)
Motor Vehicle and Parts Dealers-441						
Automotive Dealers-4411	\$26,697,908	\$7,958,781	\$18,739,127	\$24,649,129	\$48,885,396	(\$24,236,267)
Other Motor Vehicle Dealers-4412	\$22,957,253	\$5,277,500	\$17,679,753	\$21,216,968	\$47,091,557	(\$25,874,589)
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,485,390	\$111,479	\$1,420,294	\$0	\$1,420,294
	\$2,143,786	\$1,195,891	\$947,895	\$2,011,867	\$1,793,839	\$218,028
Furniture and Home Furnishings Stores-442						
Furniture Stores-4421	\$3,455,747	\$109,393	\$3,346,354	\$2,992,986	\$437,571	\$2,555,415
Home Furnishing Stores-4422	\$1,909,834	\$0	\$1,909,834	\$1,641,612	\$0	\$1,641,612
	\$1,545,913	\$109,393	\$1,436,520	\$1,351,374	\$437,571	\$913,803
Electronics and Appliances Stores-443						
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$0	\$3,326,116	\$2,852,027	\$2,432,376	\$419,651
Household Appliances Stores-443111	\$2,537,766	\$0	\$2,537,766	\$2,152,880	\$2,432,376	(\$279,496)
Radio, Television, Electronics Stores-443112	\$579,382	\$0	\$579,382	\$478,115	\$1,451,441	(\$973,326)
Computer and Software Stores-44312	\$1,958,384	\$0	\$1,958,384	\$1,674,765	\$980,935	\$693,830
Camera and Photographic Equipment Stores-44313	\$652,901	\$0	\$652,901	\$579,648	\$0	\$579,648
	\$135,449	\$0	\$135,449	\$119,499	\$0	\$119,499
Building Material and Garden Equipment Stores-444						
Building Material and Supply Dealers-4441	\$15,744,499	\$0	\$15,744,499	\$13,288,006	\$2,243,572	\$11,044,434
Home Centers-44411	\$14,465,452	\$0	\$14,465,452	\$12,210,512	\$1,622,836	\$10,587,676
Paint and Wallpaper Stores-44412	\$5,733,335	\$0	\$5,733,335	\$4,816,547	\$0	\$4,816,547
Hardware Stores-44413	\$304,179	\$0	\$304,179	\$262,574	\$0	\$262,574
Other Building Materials Dealers-44419	\$1,180,167	\$0	\$1,180,167	\$996,237	\$0	\$996,237
Building Materials, Lumberyards-444191	\$7,247,771	\$0	\$7,247,771	\$6,135,154	\$1,622,836	\$4,512,318
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$0	\$2,473,216	\$2,101,012	\$553,403	\$1,547,609
Outdoor Power Equipment Stores-44421	\$1,279,047	\$0	\$1,279,047	\$1,077,494	\$620,736	\$456,758
Nursery and Garden Centers-44422	\$201,164	\$0	\$201,164	\$169,899	\$620,736	(\$450,837)
	\$1,077,883	\$0	\$1,077,883	\$907,595	\$0	\$907,595
Food and Beverage Stores-445						
Grocery Stores-4451	\$21,356,858	\$15,850,628	\$5,506,230	\$16,308,538	\$41,154,136	(\$24,845,598)
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$13,235,256	\$6,243,093	\$14,822,796	\$38,782,766	(\$23,959,970)
Convenience Stores-44512	\$18,443,120	\$12,656,564	\$5,786,556	\$14,032,117	\$38,204,077	(\$24,171,960)
Specialty Food Stores-4452	\$1,035,229	\$578,692	\$456,537	\$790,679	\$578,689	\$211,990
Beer, Wine and Liquor Stores-4453	\$623,913	\$51,031	\$572,882	\$472,966	\$127,571	\$345,395
	\$1,254,596	\$2,564,341	(\$1,309,745)	\$1,012,776	\$2,243,799	(\$1,231,023)
Health and Personal Care Stores-446						
	\$7,777,379	\$31,105,951	(\$23,328,572)	\$5,843,067	\$10,765,471	(\$4,922,404)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Mount Joy borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Pharmacies and Drug Stores-44611	\$6,774,054	\$31,105,951	(\$24,331,897)	\$5,074,854	\$10,493,573	(\$5,418,719)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$259,933	\$0	\$259,933	\$192,771	\$0	\$192,771
Optical Goods Stores-44613	\$266,442	\$0	\$266,442	\$223,168	\$271,898	(\$48,730)
Other Health and Personal Care Stores-44619	\$476,950	\$0	\$476,950	\$352,274	\$0	\$352,274
Gasoline Stations-447						
Gasoline Stations with Convenience Stores-44711	\$18,435,658	\$6,886,917	\$11,548,741	\$15,488,314	\$11,432,505	\$4,055,810
Other Gasoline Stations-44719	\$14,061,042	\$4,157,274	\$9,903,768	\$11,695,916	\$11,432,505	\$263,411
	\$4,374,616	\$2,729,643	\$1,644,973	\$3,792,398	\$0	\$3,792,398
Clothing & Clothing Accessories Stores-448						
Clothing Stores-4481	\$6,417,835	\$942,868	\$5,474,967	\$5,566,156	\$1,834,330	\$3,731,826
Men's Clothing Stores-44811	\$4,710,700	\$942,868	\$3,767,832	\$4,053,618	\$390,127	\$3,663,491
Women's Clothing Stores-44812	\$335,647	\$780,258	(\$444,611)	\$281,356	\$390,127	(\$108,771)
Children's, Infants' Clothing Stores-44813	\$1,110,775	\$162,610	\$948,165	\$994,983	\$0	\$994,983
Family Clothing Stores-44814	\$294,927	\$0	\$294,927	\$226,838	\$0	\$226,838
Clothing Accessories Stores-44815	\$2,575,421	\$0	\$2,575,421	\$2,202,194	\$0	\$2,202,194
Other Clothing Stores-44819	\$98,958	\$0	\$98,958	\$89,935	\$0	\$89,935
Shoe Stores-4482	\$294,972	\$0	\$294,972	\$258,312	\$0	\$258,312
Jewelry, Luggage, Leather Goods Stores-4483	\$864,903	\$0	\$864,903	\$721,380	\$0	\$721,380
Jewelry Stores-44831	\$842,232	\$0	\$842,232	\$791,158	\$1,444,203	(\$653,045)
Luggage and Leather Goods Stores-44832	\$774,275	\$0	\$774,275	\$727,671	\$1,444,203	(\$716,532)
	\$67,957	\$0	\$67,957	\$63,487	\$0	\$63,487
Sporting Goods, Hobby, Book, Music Stores-451						
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$2,324,556	\$1,471,284	\$853,272	\$2,090,798	\$240,466	\$1,850,332
Sporting Goods Stores-45111	\$1,605,801	\$863,239	\$742,562	\$1,439,704	\$240,466	\$1,199,238
Hobby, Toys & Games Stores-45112	\$761,237	\$334,213	\$427,024	\$700,694	\$0	\$700,694
Sew/Needlework/Piece Goods Stores-45113	\$555,149	\$0	\$555,149	\$483,256	\$240,466	\$242,790
Musical Instrument and Supplies Stores-45114	\$127,853	\$0	\$127,853	\$112,938	\$0	\$112,938
Book, Periodical and Music Stores-4512	\$161,562	\$529,026	(\$367,464)	\$142,816	\$0	\$142,816
Book Stores and News Dealers-45121	\$718,755	\$608,045	\$110,710	\$651,094	\$0	\$651,094
Book Stores-451211	\$480,282	\$608,045	(\$127,763)	\$438,626	\$0	\$438,626
News Dealers & Newsstands-451212	\$444,088	\$0	\$444,088	\$409,875	\$0	\$409,875
Prerecorded Tapes, CDs, Record Stores-45122	\$36,194	\$608,045	(\$571,851)	\$28,751	\$0	\$28,751
	\$238,473	\$0	\$238,473	\$212,468	\$0	\$212,468
General Merchandise Stores-452						
Department Stores Excluding Leased Departments-4521	\$18,617,428	\$1,417,245	\$17,200,183	\$15,174,514	\$1,240,092	\$13,934,422
Other General Merchandise Stores-4529	\$8,333,790	\$0	\$8,333,790	\$6,959,375	\$0	\$6,959,375
	\$10,283,638	\$1,417,245	\$8,866,393	\$8,215,139	\$1,240,092	\$6,975,047

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Mount Joy borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$0	\$8,965,055	\$7,110,925	\$0	\$7,110,925
All Other General Merchandise Stores-45299	\$1,318,583	\$1,417,245	(\$98,662)	\$1,104,214	\$1,240,092	(\$135,878)
Miscellaneous Store Retailers-453						
Florists-4531	\$3,999,212	\$3,196,613	\$802,599	\$3,340,977	\$2,457,599	\$883,378
Office Supplies, Stationery, Gift Stores-4532	\$269,186	\$467,733	(\$198,547)	\$231,207	\$514,509	(\$283,302)
Office Supplies, Stationery Stores-45321	\$1,566,326	\$320,854	\$1,245,472	\$1,327,357	\$936,261	\$391,096
Gift, Novelty and Souvenir Stores-45322	\$891,445	\$0	\$891,445	\$755,444	\$294,549	\$460,895
Used Merchandise Stores-4533	\$674,881	\$320,854	\$354,027	\$571,913	\$641,712	(\$69,799)
Other Miscellaneous Store Retailers-4539	\$310,571	\$669,207	(\$358,636)	\$267,122	\$758,427	(\$491,305)
	\$1,853,129	\$1,738,819	\$114,310	\$1,515,291	\$248,402	\$1,266,889
Non-Store Retailers-454						
Electronic Shopping, Mail-Order Houses-4541	\$11,600,568	\$0	\$11,600,568	\$9,423,661	\$0	\$9,423,661
Vending Machine Operators-4542	\$6,317,629	\$0	\$6,317,629	\$5,410,693	\$0	\$5,410,693
Direct Selling Establishments-4543	\$449,726	\$0	\$449,726	\$345,478	\$0	\$345,478
	\$4,833,213	\$0	\$4,833,213	\$3,667,490	\$0	\$3,667,490
Foodservice and Drinking Places-722						
Full-Service Restaurants-7221	\$16,363,711	\$11,251,927	\$5,111,784	\$13,337,160	\$26,129,073	(\$12,791,913)
Limited Service Eating Places-7222	\$7,526,136	\$451,416	\$7,074,720	\$6,137,538	\$19,561,393	(\$13,423,855)
Special Foodservices-7223	\$6,696,014	\$3,552,936	\$3,143,078	\$5,449,151	\$5,659,545	(\$210,394)
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$6,574,899	(\$5,208,087)	\$1,113,950	\$908,135	\$205,815
	\$774,749	\$672,676	\$102,073	\$636,521	\$0	\$636,521

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Middletown borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Total Retail Sales Including Eating and Drinking Places	\$156,117,475	\$80,191,607	\$75,925,868	\$136,614,795	\$97,974,989	\$38,639,806
Motor Vehicle and Parts Dealers-441						
Automotive Dealers-4411	\$26,697,908	\$7,958,781	\$18,739,127	\$27,771,701	\$2,138,492	\$25,633,209
Other Motor Vehicle Dealers-4412	\$22,957,253	\$5,277,500	\$17,679,753	\$24,019,276	\$1,108,643	\$22,910,633
Auto Parts/Accessories, Tire Stores-4413	\$1,596,869	\$1,485,390	\$111,479	\$1,661,545	\$0	\$1,661,545
	\$2,143,786	\$1,195,891	\$947,895	\$2,090,880	\$1,029,849	\$1,061,031
Furniture and Home Furnishings Stores-442						
Furniture Stores-4421	\$3,455,747	\$109,393	\$3,346,354	\$2,849,958	\$3,664,434	(\$814,476)
Home Furnishing Stores-4422	\$1,909,834	\$0	\$1,909,834	\$1,600,269	\$3,664,434	(\$2,064,165)
	\$1,545,913	\$109,393	\$1,436,520	\$1,249,689	\$0	\$1,249,689
Electronics and Appliances Stores-443						
Appliances, Televisions, Electronics Stores-44311	\$3,326,116	\$0	\$3,326,116	\$2,980,110	\$1,924,016	\$1,056,094
Household Appliances Stores-443111	\$2,537,766	\$0	\$2,537,766	\$2,230,781	\$1,924,016	\$306,765
Radio, Television, Electronics Stores-443112	\$579,382	\$0	\$579,382	\$490,791	\$343,202	\$147,589
Computer and Software Stores-44312	\$1,958,384	\$0	\$1,958,384	\$1,739,990	\$1,580,814	\$159,176
Camera and Photographic Equipment Stores-44313	\$652,901	\$0	\$652,901	\$631,422	\$0	\$631,422
	\$135,449	\$0	\$135,449	\$117,907	\$0	\$117,907
Building Material and Garden Equipment Stores-444						
Building Material and Supply Dealers-4441	\$15,744,499	\$0	\$15,744,499	\$12,645,856	\$15,821,723	(\$3,175,866)
Home Centers-44411	\$14,465,452	\$0	\$14,465,452	\$11,572,057	\$15,821,723	(\$4,249,666)
Paint and Wallpaper Stores-44412	\$5,733,335	\$0	\$5,733,335	\$4,604,317	\$0	\$4,604,317
Hardware Stores-44413	\$304,179	\$0	\$304,179	\$242,274	\$0	\$242,274
Other Building Materials Dealers-44419	\$1,180,167	\$0	\$1,180,167	\$980,596	\$0	\$980,596
Building Materials, Lumberyards-444191	\$7,247,771	\$0	\$7,247,771	\$5,744,870	\$15,821,723	(\$10,076,853)
Lawn/Garden Equipment, Supplies Stores-4442	\$2,473,216	\$0	\$2,473,216	\$1,955,974	\$5,395,381	(\$3,439,407)
Outdoor Power Equipment Stores-44421	\$1,279,047	\$0	\$1,279,047	\$1,073,799	\$0	\$1,073,799
Nursery and Garden Centers-44422	\$201,164	\$0	\$201,164	\$165,713	\$0	\$165,713
	\$1,077,883	\$0	\$1,077,883	\$908,086	\$0	\$908,086
Food and Beverage Stores-445						
Grocery Stores-4451	\$21,356,858	\$15,850,628	\$5,506,230	\$17,731,289	\$25,263,569	(\$7,532,280)
Supermarket, Grocery Excluding Convenience Stores-44511	\$19,478,349	\$13,235,256	\$6,243,093	\$16,286,381	\$22,845,077	(\$6,558,696)
Convenience Stores-44512	\$18,443,120	\$12,656,564	\$5,786,556	\$15,414,705	\$22,333,229	(\$6,918,524)
Specialty Food Stores-4452	\$1,035,229	\$578,692	\$456,537	\$871,676	\$511,848	\$359,828
Beer, Wine and Liquor Stores-4453	\$623,913	\$51,031	\$572,882	\$511,856	\$94,797	\$417,059
	\$1,254,596	\$2,564,341	(\$1,309,745)	\$933,052	\$2,323,695	(\$1,390,643)
Health and Personal Care Stores-446						
	\$7,777,379	\$31,105,951	(\$23,328,572)	\$6,749,448	\$8,281,193	(\$1,531,745)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Middletown borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Pharmacies and Drug Stores-44611	\$6,774,054	\$31,105,951	(\$24,331,897)	\$5,875,797	\$8,281,193	(\$2,405,396)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$259,933	\$0	\$259,933	\$226,503	\$0	\$226,503
Optical Goods Stores-44613	\$266,442	\$0	\$266,442	\$234,175	\$0	\$234,175
Other Health and Personal Care Stores-44619	\$476,950	\$0	\$476,950	\$412,973	\$0	\$412,973
Gasoline Stations-447						
Gasoline Stations with Convenience Stores-44711	\$18,435,658	\$6,886,917	\$11,548,741	\$16,287,709	\$17,104,967	(\$817,258)
Other Gasoline Stations-44719	\$14,061,042	\$4,157,274	\$9,903,768	\$12,362,215	\$11,277,564	\$1,084,650
	\$4,374,616	\$2,729,643	\$1,644,973	\$3,925,494	\$5,827,403	(\$1,901,909)
Clothing & Clothing Accessories Stores-448						
Clothing Stores-4481	\$6,417,835	\$942,868	\$5,474,967	\$5,594,328	\$266,418	\$5,327,910
Men's Clothing Stores-44811	\$4,710,700	\$942,868	\$3,767,832	\$4,135,301	\$266,418	\$3,868,883
Women's Clothing Stores-44812	\$335,647	\$780,258	(\$444,611)	\$291,868	\$0	\$291,868
Children's, Infants' Clothing Stores-44813	\$1,110,775	\$162,610	\$948,165	\$995,871	\$0	\$995,871
Family Clothing Stores-44814	\$294,927	\$0	\$294,927	\$245,091	\$0	\$245,091
Clothing Accessories Stores-44815	\$2,575,421	\$0	\$2,575,421	\$2,252,842	\$0	\$2,252,842
Other Clothing Stores-44819	\$98,958	\$0	\$98,958	\$85,731	\$0	\$85,731
Shoe Stores-4482	\$294,972	\$0	\$294,972	\$263,898	\$266,418	(\$2,520)
Jewelry, Luggage, Leather Goods Stores-4483	\$864,903	\$0	\$864,903	\$755,712	\$0	\$755,712
Jewelry Stores-44831	\$842,232	\$0	\$842,232	\$703,315	\$0	\$703,315
Luggage and Leather Goods Stores-44832	\$774,275	\$0	\$774,275	\$645,512	\$0	\$645,512
	\$67,957	\$0	\$67,957	\$57,803	\$0	\$57,803
Sporting Goods, Hobby, Book, Music Stores-451						
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$2,324,556	\$1,471,284	\$853,272	\$2,414,778	\$1,149,104	\$1,265,674
Sporting Goods Stores-45111	\$1,605,801	\$863,239	\$742,562	\$1,727,585	\$1,149,104	\$578,481
Hobby, Toys & Games Stores-45112	\$761,237	\$334,213	\$427,024	\$910,159	\$500,417	\$409,742
Sew/Needlework/Piece Goods Stores-45113	\$555,149	\$0	\$555,149	\$545,631	\$304,739	\$240,892
Musical Instrument and Supplies Stores-45114	\$127,853	\$0	\$127,853	\$123,832	\$0	\$123,832
Book, Periodical and Music Stores-4512	\$161,562	\$529,026	(\$367,464)	\$147,963	\$343,948	(\$195,985)
Book Stores and News Dealers-45121	\$718,755	\$608,045	\$110,710	\$687,193	\$0	\$687,193
Book Stores-451211	\$480,282	\$608,045	(\$127,763)	\$464,458	\$0	\$464,458
News Dealers & Newsstands-451212	\$444,088	\$0	\$444,088	\$431,787	\$0	\$431,787
Prerecorded Tapes, CDs, Record Stores-45122	\$36,194	\$608,045	(\$571,851)	\$32,671	\$0	\$32,671
	\$238,473	\$0	\$238,473	\$222,735	\$0	\$222,735
General Merchandise Stores-452						
Department Stores Excluding Leased Departments-4521	\$18,617,428	\$1,417,245	\$17,200,183	\$16,250,479	\$12,918,744	\$3,331,734
Other General Merchandise Stores-4529	\$8,333,790	\$0	\$8,333,790	\$7,369,239	\$3,675,446	\$3,693,793
	\$10,283,638	\$1,417,245	\$8,866,393	\$8,881,240	\$9,243,298	(\$362,058)

Retail Market Power

Opportunity Gap Report	Columbia borough, PA			Middletown borough, PA		
	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage	2008 Demand Consumer Expenditures	2008 Supply Retail Sales	Opportunity Gap Surplus/ Shortage
Warehouse Clubs and Super Stores-45291	\$8,965,055	\$0	\$8,965,055	\$7,722,325	\$6,117,813	\$1,604,512
All Other General Merchandise Stores-45299	\$1,318,583	\$1,417,245	(\$98,662)	\$1,158,915	\$3,125,485	(\$1,966,570)
Miscellaneous Store Retailers-453						
Florists-4531	\$3,999,212	\$3,196,613	\$802,599	\$3,469,188	\$1,737,529	\$1,731,659
Office Supplies, Stationery, Gift Stores-4532	\$269,186	\$467,733	(\$198,547)	\$228,232	\$156,510	\$71,722
Office Supplies, Stationery Stores-45321	\$1,566,326	\$320,854	\$1,245,472	\$1,364,735	\$833,846	\$530,889
Gift, Novelty and Souvenir Stores-45322	\$891,445	\$0	\$891,445	\$781,848	\$0	\$781,848
Used Merchandise Stores-4533	\$674,881	\$320,854	\$354,027	\$582,887	\$833,846	(\$250,959)
Other Miscellaneous Store Retailers-4539	\$310,571	\$669,207	(\$358,636)	\$272,405	\$652,701	(\$380,296)
	\$1,853,129	\$1,738,819	\$114,310	\$1,603,816	\$94,472	\$1,509,344
Non-Store Retailers-454						
Electronic Shoppng, Mail-Order Houses-4541	\$11,600,568	\$0	\$11,600,568	\$10,382,202	\$0	\$10,382,202
Vending Machine Operators-4542	\$6,317,629	\$0	\$6,317,629	\$5,787,620	\$0	\$5,787,620
Direct Selling Establishments-4543	\$449,726	\$0	\$449,726	\$363,729	\$0	\$363,729
	\$4,833,213	\$0	\$4,833,213	\$4,230,853	\$0	\$4,230,853
Foodservice and Drinking Places-722						
Full-Service Restaurants-7221	\$16,363,711	\$11,251,927	\$5,111,784	\$11,487,749	\$7,704,800	\$3,782,949
Limited Service Eating Places-7222	\$7,526,136	\$451,416	\$7,074,720	\$5,254,007	\$4,424,115	\$829,892
Special Foodservices-7223	\$6,696,014	\$3,552,936	\$3,143,078	\$4,751,642	\$3,238,863	\$1,512,779
Drinking Places Alcoholic Beverages-7224	\$1,366,812	\$6,574,899	(\$5,208,087)	\$978,305	\$41,822	\$936,483
	\$774,749	\$672,676	\$102,073	\$503,795	\$0	\$503,795

