



LANCASTER COUNTY

.....
A Changing Place, 2000 – 2015

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THE INFANTREE



LANCASTER COUNTY IS A

*changing
place.*

Lancaster County is a special place. While it still has the great qualities we all recognize, it's constantly changing. Over the past 15 years, we've seen changes in people, jobs, housing, infrastructure, transportation, and treasured resources. *Lancaster County: A Changing Place, 2000–2015* describes the shifting landscape of our community, and how it compares to surrounding counties, the region, state, and nation.

This report is a snapshot of Lancaster County as it exists today, and the journey we've taken to get here. It doesn't offer any solutions to the issues we face, because that's a discussion for another day. Instead, it serves as a foundation for continued dialogue about the opportunities and challenges in front of us for the next

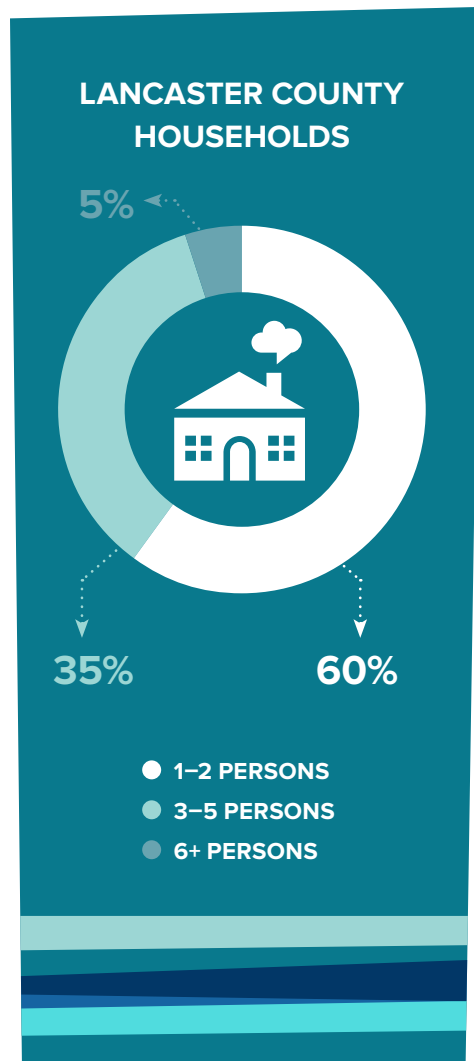
25 years. What do these changes mean, and what do they tell us about the future?

The purpose of this document is to stimulate informed discussion and innovative thinking about where we're headed, and how we're going to get there. It's the first step in creating [places2040](#), an update to the Lancaster County Comprehensive Plan. Every so often, communities need take stock of where they are and establish a new vision for the future. This plan is a chance to ensure that all of us are working together to make Lancaster County a better place.

Join the conversation! Help us ensure a bright future for this county we call home.

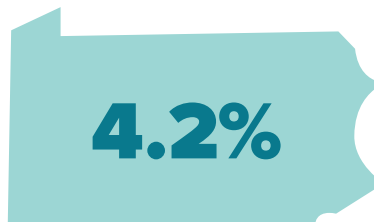
WHO WE ARE

Lancaster County's population continues to grow, due in part to natural increase and some migration – but we're losing many of our young adults. Our population is becoming older and more diverse, but it's younger and less diverse than the state and surrounding counties. Households are smaller, just as they are nationwide. Educational levels and employment are growing, and unemployment is low. However, incomes are not keeping pace with inflation, the poverty rate is increasing, and our educational attainment lags behind other communities. Obesity and asthma are on the rise.

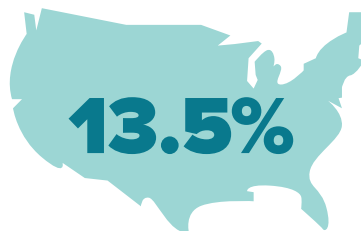


534,130 Lancaster County's 2015 Population

We grew at a much faster rate than the state



and at the same rate as the nation



Incomes are not keeping up with inflation. When adjusted for inflation, the median income of Lancaster County households declined between 1999 and 2015.

Household income typically peaks when a householder is between the ages of 45 and 54.

Poverty rates are inequitably high among the populations that are growing the fastest.



THERE ARE HEALTH ISSUES OF CONCERN IN THE COUNTY.

11%

INCIDENCES OF ASTHMA

Up 2% since 2001

15%

OBESITY IN CHILDREN

Stable since 2001

28%

OBESITY IN ADULTS

Up 4% since 2001

32%

DEATHS FROM Cardiovascular DISEASE

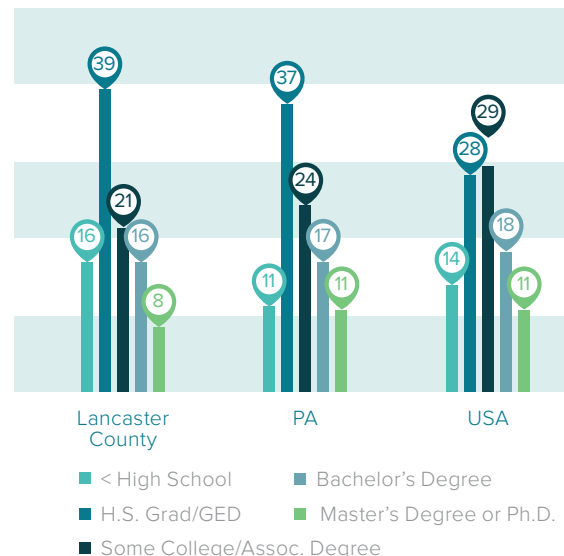
Down 1% since 2000

WHO WE ARE CONTINUED...



But we are losing young adults to other parts of the country.

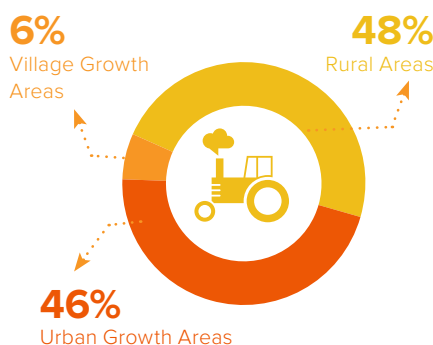
HIGHEST LEVEL OF EDUCATIONAL ATTAINMENT IN THE U.S., STATE AND COUNTY 2015 (IN PERCENTAGES)



WHERE WE LIVE

While development is happening where we want it, we're consuming more land than we should. A majority of new homes is being built in growth areas near the city, boroughs, and villages. However, we're not achieving the targets we set in the county's 2006 growth management plan, which calls for 85% of new homes to be built in growth areas, and at 7.5 dwellings per acre. We're building more homes than surrounding counties, but construction has slowed since the recession. Most new homes are single-family homes, but we're building more attached housing. More people are choosing to rent, but there's a shortage of affordable units.

ACREAGE DEVELOPED 2002 – 2015 (ACRES)

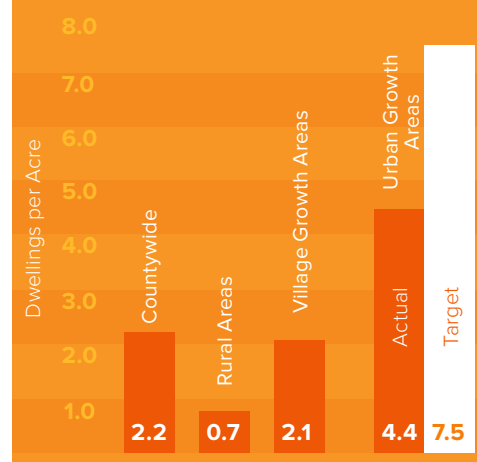


LOCATION OF NEW DWELLINGS CONSTRUCTED 2002 – 2015



We are building more homes than other counties in the region. Lancaster County's housing unit growth of 16.4% from 2000–2015 is much greater than the state's rate of 7.8%, but less than the national rate of 17.9%.

Residential Development Density Dwellings per Acre 2002 – 2015



80% OF NEW DWELLINGS

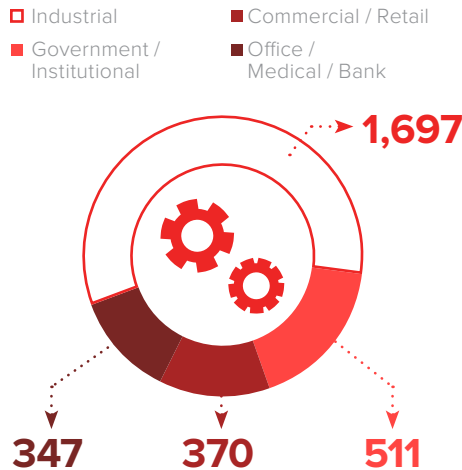
being constructed are single-family homes.

More people are choosing to rent. The percent of housing units that were renter-occupied increased from 29.2% to 31.6% between 2000 and 2015.

WHERE WE WORK

Lancaster County continues to have a diverse economy. Manufacturing has declined, but accounts for 20% of all wages. Traditional industries such as agriculture, food processing, and tourism remain strong, but newer industries account for much of our employment, wage, and sales growth. These industries include healthcare, education, professional and technical services, finance and insurance, and wholesale and retail trade. Most of the county's workers live in the county. More than half of non-residential development was for industrial use, and occurred mostly in growth areas.

NON-RESIDENTIAL LAND DEVELOPMENT by type in Lancaster County (Acres) 2002 – 2015



83% of Lancaster County residents are employed in Lancaster County – one of PA's highest rates of workers employed within their county of residence.

LANCASTER COUNTY CONTINUES TO HAVE A DIVERSE ECONOMY.

NUMBER OF JOBS IN TOP INDUSTRY SECTORS

- 1 Healthcare and Social Assistance
- 2 Manufacturing
- 3 Retail Trade
- 4 Accommodation and Food Services
- 5 Educational Services

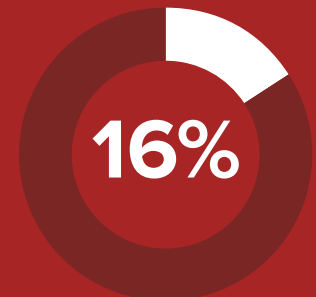
TOTAL ANNUAL WAGES FOR TOP INDUSTRY SECTORS

- 1 Manufacturing
- 2 Healthcare and Social Assistance
- 3 Construction
- 4 Retail Trade
- 5 Educational Services



MANUFACTURING IN LANCASTER COUNTY IN 2014

**36,042
EMPLOYEES**



OF TOTAL EMPLOYEES



OF ALL WAGES PAID

**\$1,025
AVERAGE WEEKLY WAGE**

HOW WE INVEST IN OUR COMMUNITIES

Public infrastructure such as police, emergency medical services (EMS), parks, trails, and libraries keep our communities running. The vast majority of new homes in growth areas are served by public water and sewer. Most of the county is served by local police departments, rather than state police. Fire companies have merged, and EMS organizations have consolidated and shifted from volunteer to paid staff. Demand for library services has increased, public park acreage has increased significantly, and almost 50 miles of regional trails were added.



LANCASTER COUNTY POLICE DEPARTMENTS

26 departments serve
43 municipalities and
85% of the population

LANCASTER COUNTY EMERGENCY MEDICAL SERVICES ORGANIZATIONS

34 mostly all volunteer 1990
17 all but one paid or partially paid 2015

PUBLIC WATER & SEWER IN URBAN GROWTH AREAS

95%

new dwellings served by public sewer

93%

new dwellings served by public water

PUBLIC WATER & SEWER IN VILLAGE GROWTH AREAS

72%

new dwellings served by public sewer

49%

new dwellings served by public water



FIRE COMPANIES HAVE MERGED TO CONSOLIDATE VOLUNTEER FORCES AND REDUCE COSTS.

In 2000, there were

85

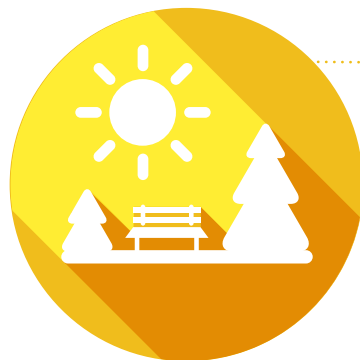
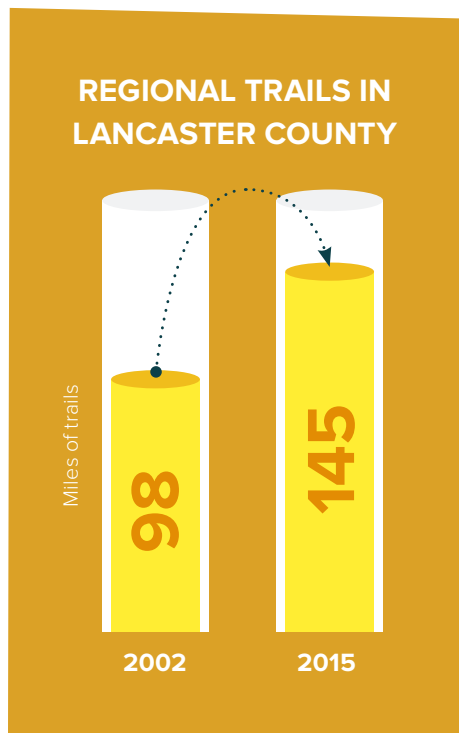
volunteer fire companies in the county.

As of July 2015 there were

70

companies – and they’ve been merging to maximize volunteer manpower and reduce costs.

HOW WE INVEST CONTINUED...



Lancaster County's residents now have access to

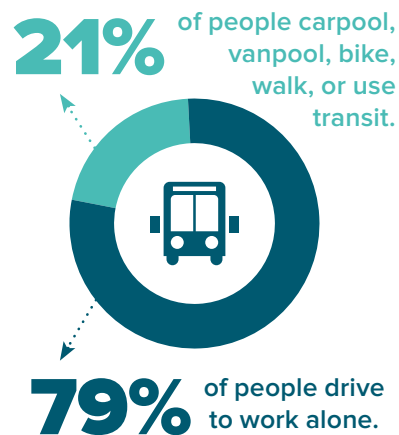
1,787 MORE ACRES of public parkland

than they did in 2002. That is a 34.1% increase.

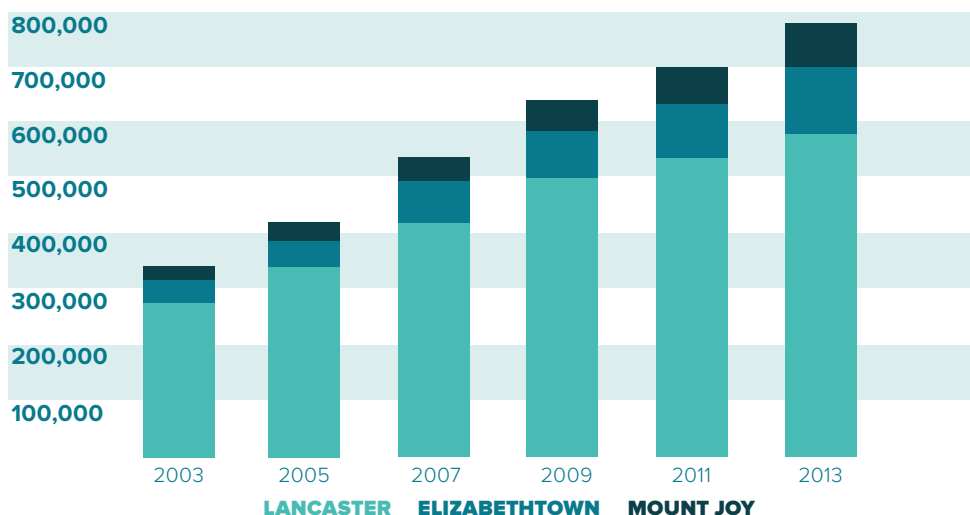
HOW WE MOVE PEOPLE AND GOODS

The way we move around the county has not changed significantly. The county's residents still depend on their cars, especially for commuting, and most workers commute less than 30 minutes each

way. Amtrak ridership is up, but transit usage remains below the state average. Bicycle and pedestrian infrastructure has improved. More freight is moving through the county, mostly by truck.



LANCASTER COUNTY AMTRAK RIDERSHIP 2003 – 2013



These figures have remained relatively constant since 2000.

Amtrak ridership rose significantly, but transit ridership increased less.

Transit ridership is well below the statewide average (1.2% in Lancaster County vs. 5.4% for the state).

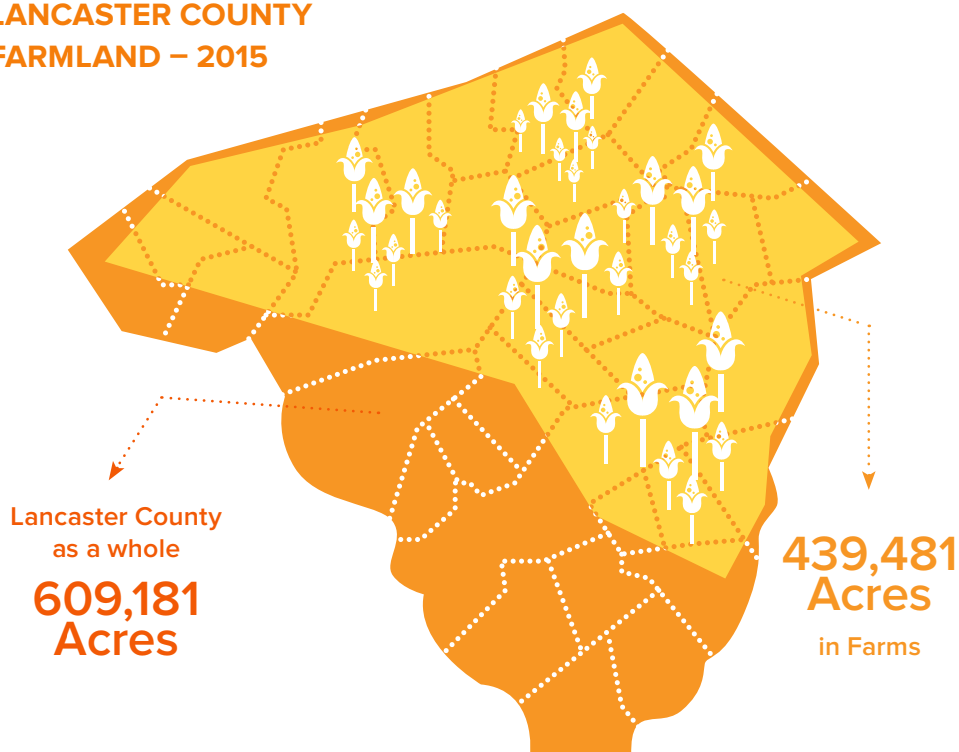
HOW WE PROTECT OUR TREASURED RESOURCES

We've made progress in meeting some of our goals to conserve and protect natural, historic, and cultural resources. We've improved zoning to better protect farmland, and we lead the nation in acres of farmland that are permanently preserved. We've also preserved an additional 3,000 acres of natural lands since 2002. Water quality in

our streams is improving, but 43% of them are designated as impaired. Only 25% of the county is covered by tree canopy. Our air quality is better, but still not good. We've identified and protected more historic resources, but continue to lose them.

We've preserved a total of
16,060 ACRES
of natural lands in
Lancaster County.
Of that total, almost
3,000 ACRES
have been preserved
since 2002.

LANCASTER COUNTY FARMLAND – 2015



(Identified by USDA Census of Agriculture)

Although more municipalities have surveyed historic resources and adopted provisions to protect them, many communities have continued to approve the demolition of these resources.



Lancaster County
became the first
county in the nation
to preserve

**100,000
ACRES**

of farmland with a
2014 year-end total of

**101,075
ACRES.**

WHAT DOES THE FUTURE HOLD?

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This report is just the beginning of the process to develop places2040, an update to the Lancaster County Comprehensive Plan. It paints a picture of where the county has been in recent years, and identifies some of the issues that will inform our approach to the future. Although some

trends might be outside our control, such as demographics, others can be molded to make Lancaster County a better place. The trends we see are not necessarily our destiny. Get involved and help us create the future we want to see!





REVISED NOVEMBER 17, 2015