

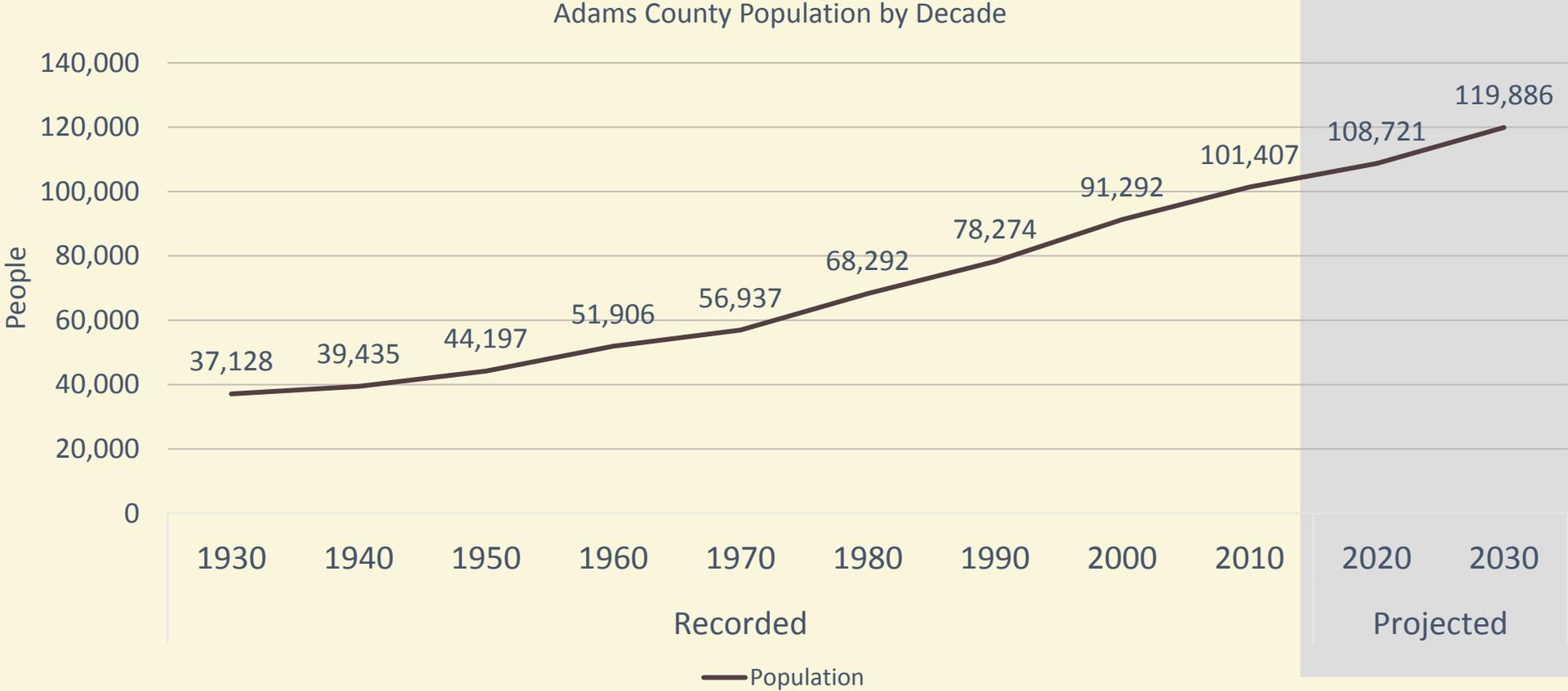
An Economic Profile of Adams County



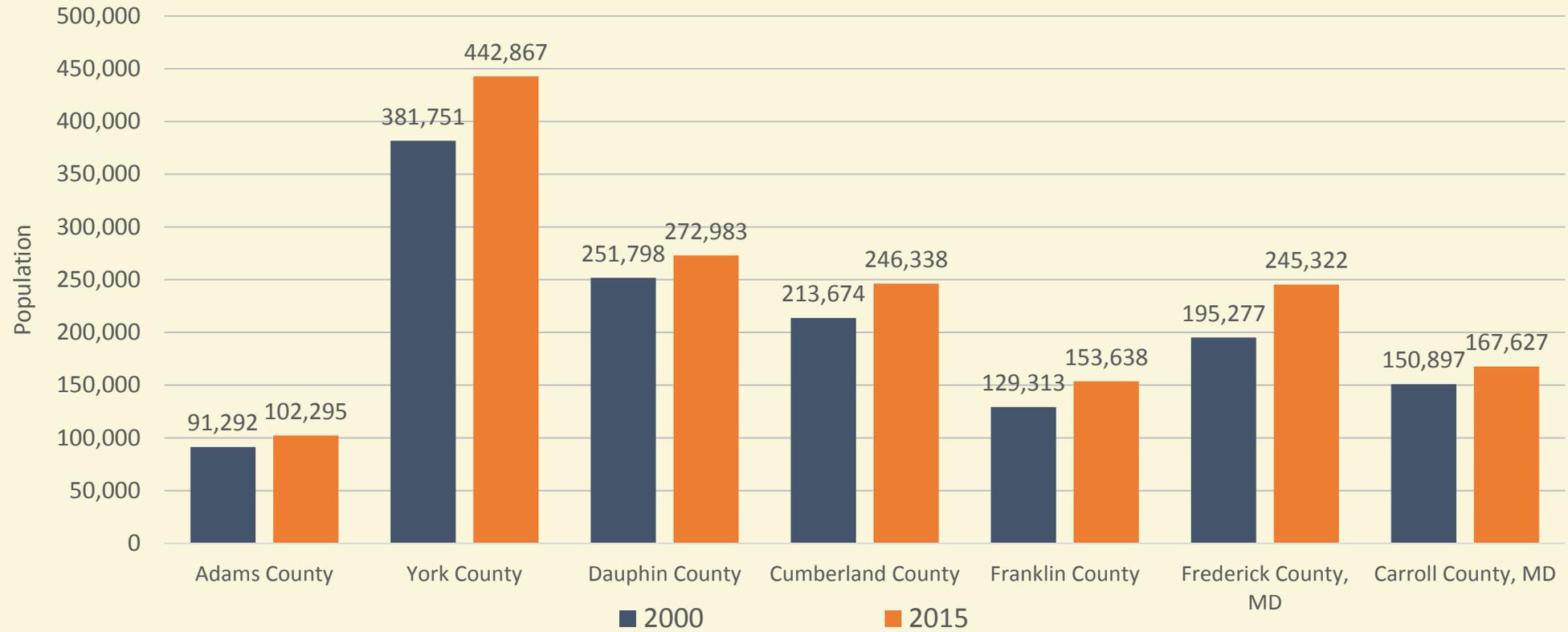
Thursday, December 14, 2017



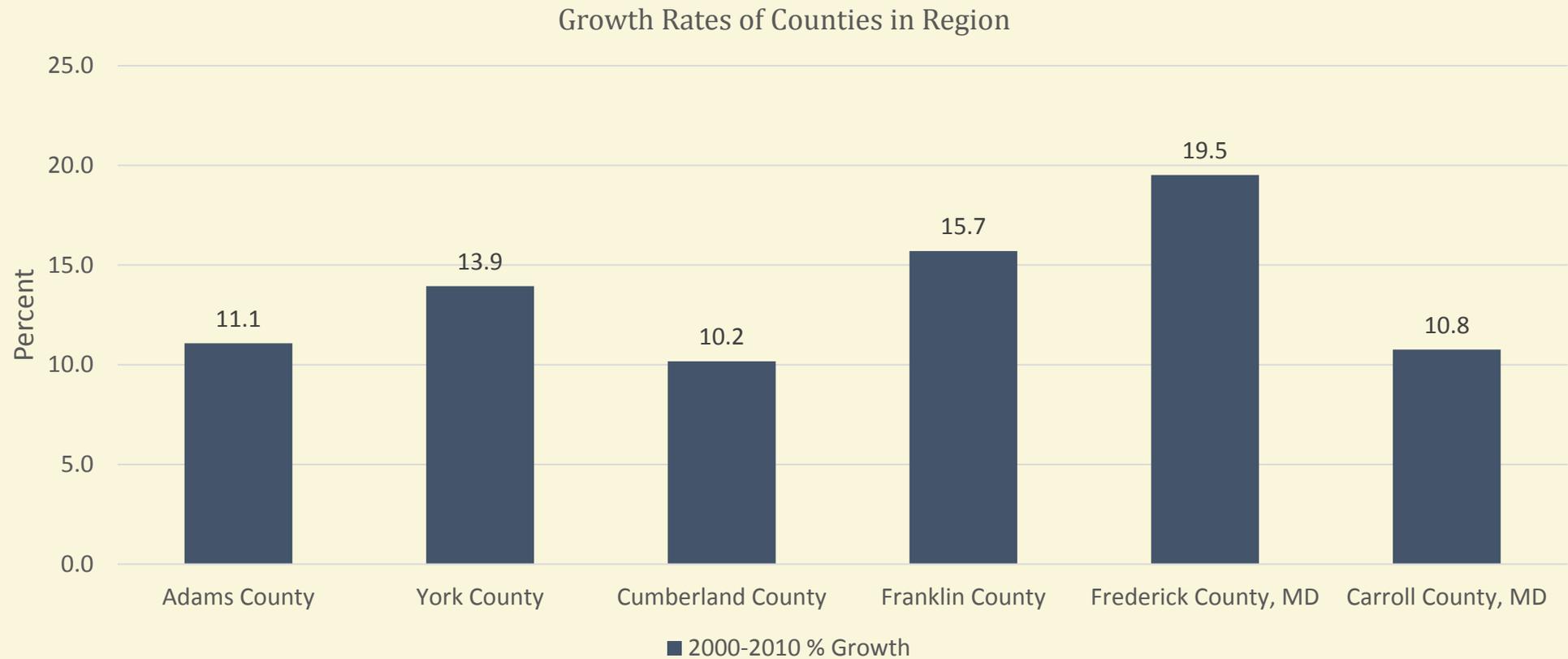
Population



Population

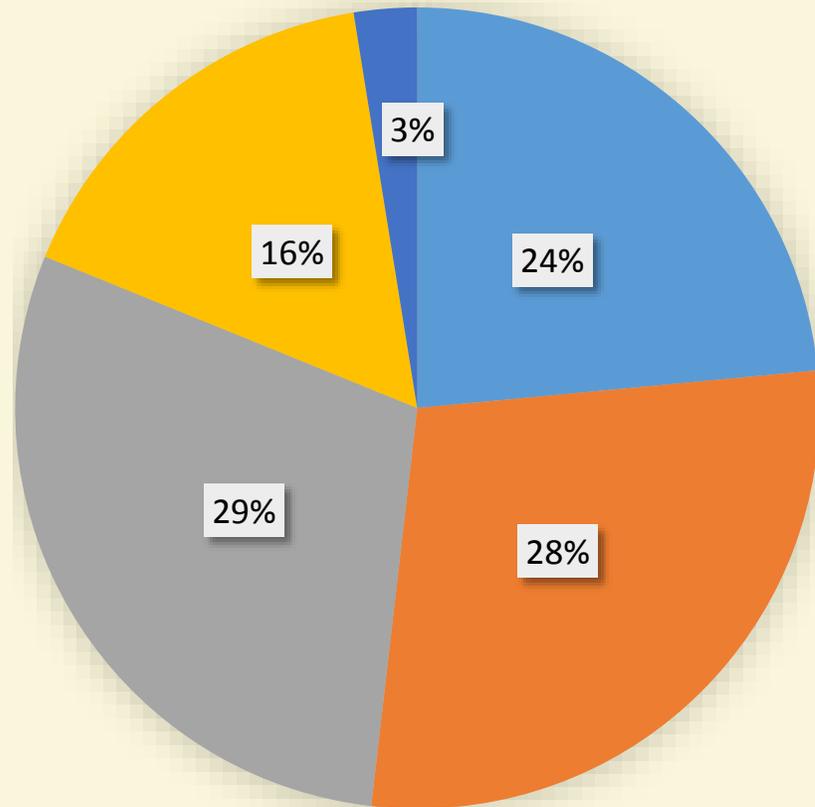


Population



Age

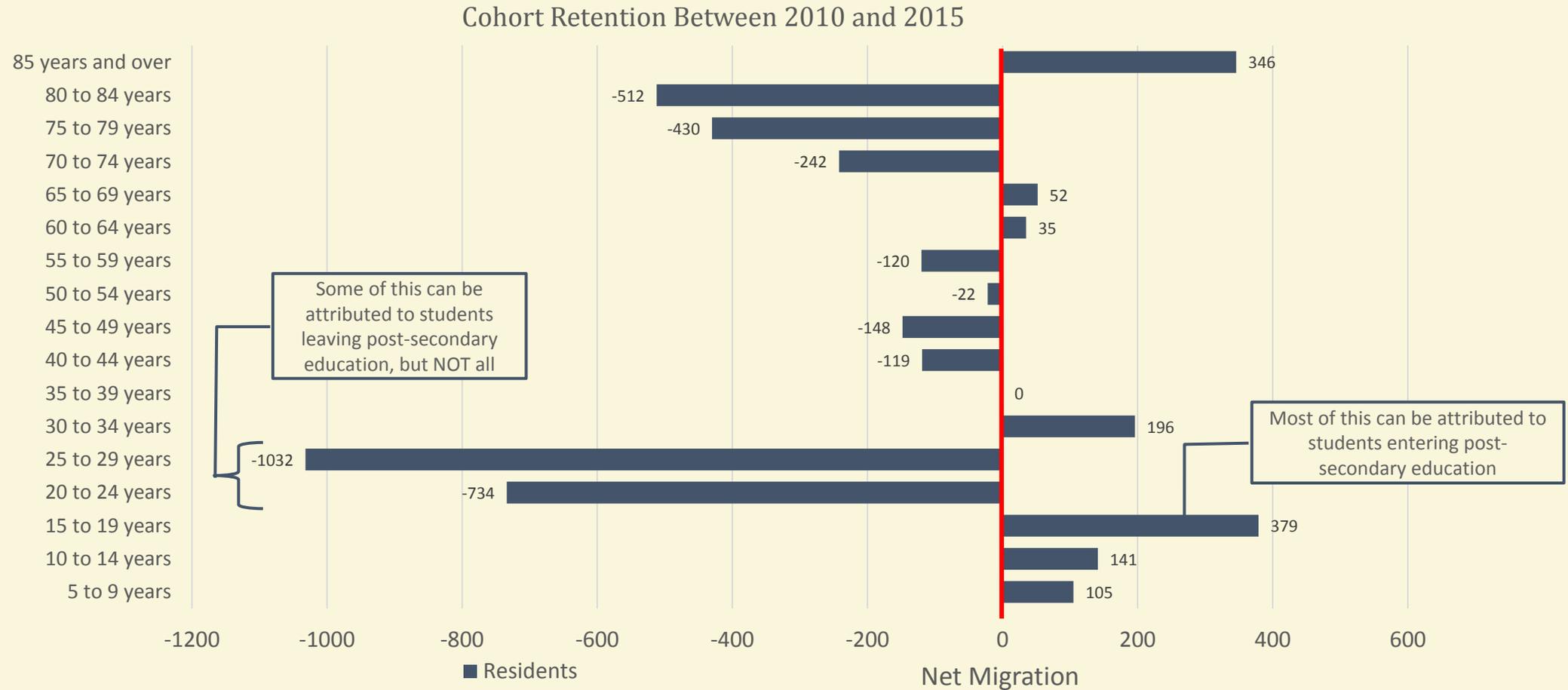
Median Age – 43.6 years (2015) compared to 37 years in 2000



- Under 20
- 20 to 44
- 45 to 64
- 65 to 84
- 85 and over

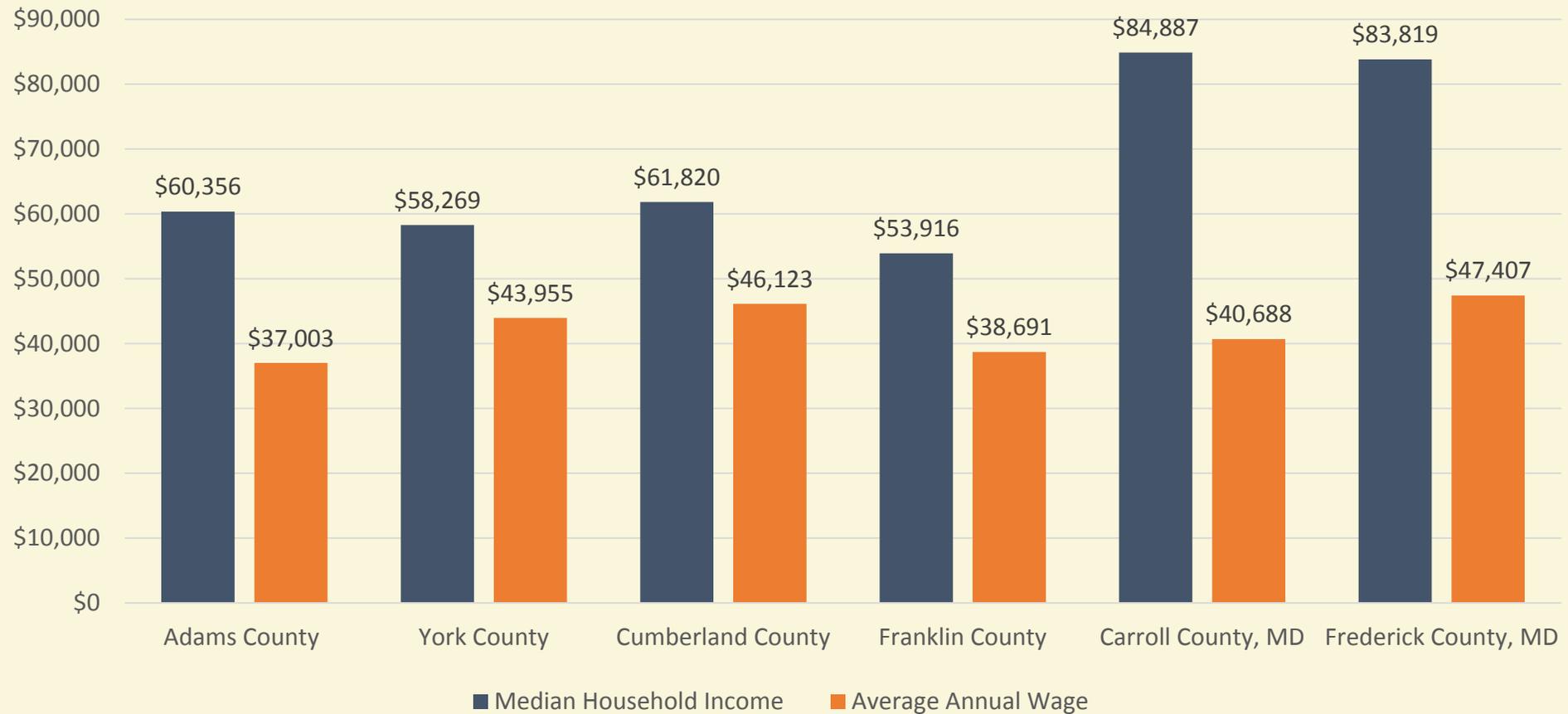
- 24% of residents **Under 20** is lower than state and national averages
- 28% of residents **20 to 44** is lower than state and national averages
- 29% of residents **45 to 64** is higher than state and national averages

Age



Income

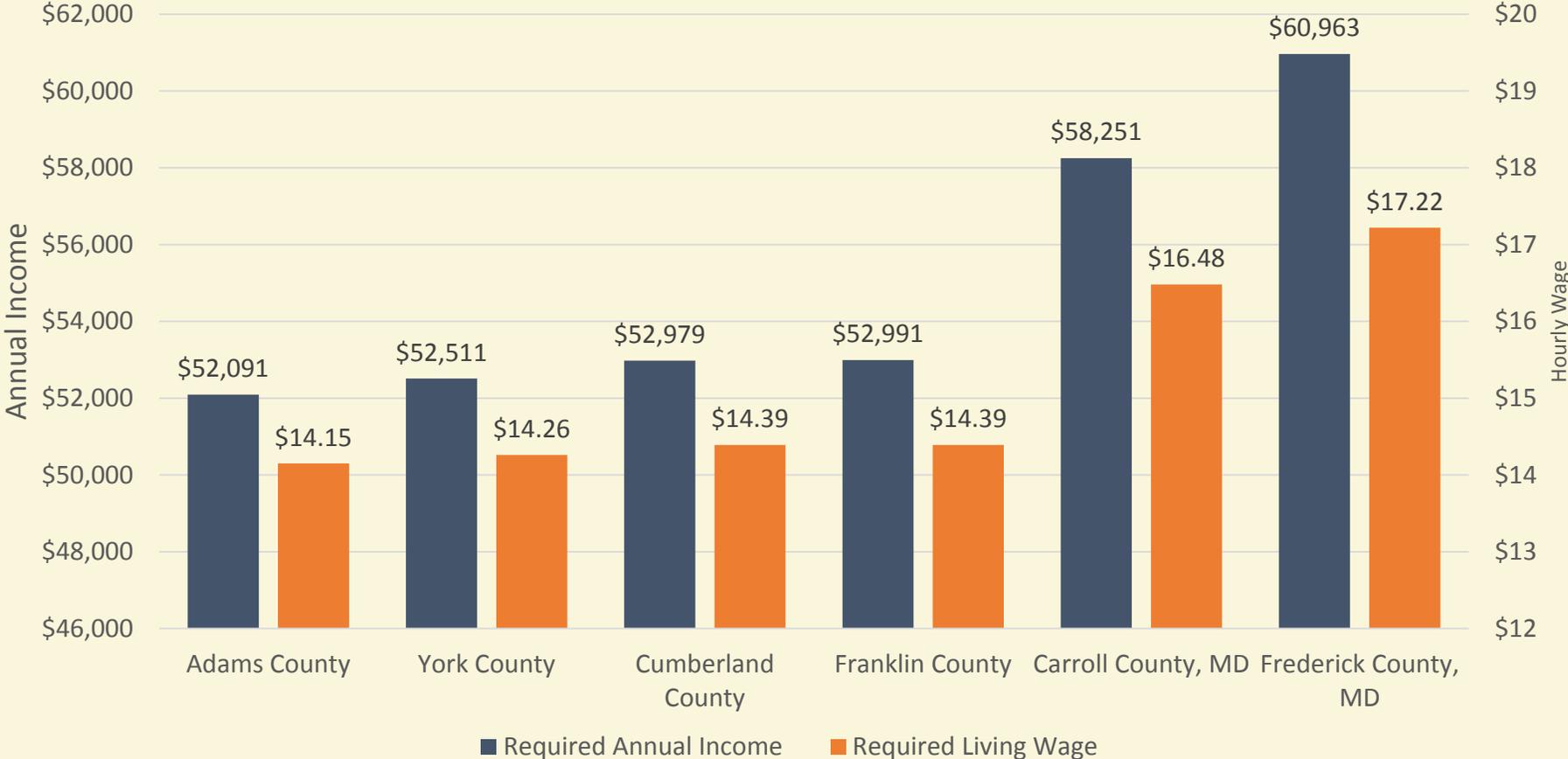
Median Household Income and Average Annual Wage



Data values are from 2015, the most recent year both datasets are available.

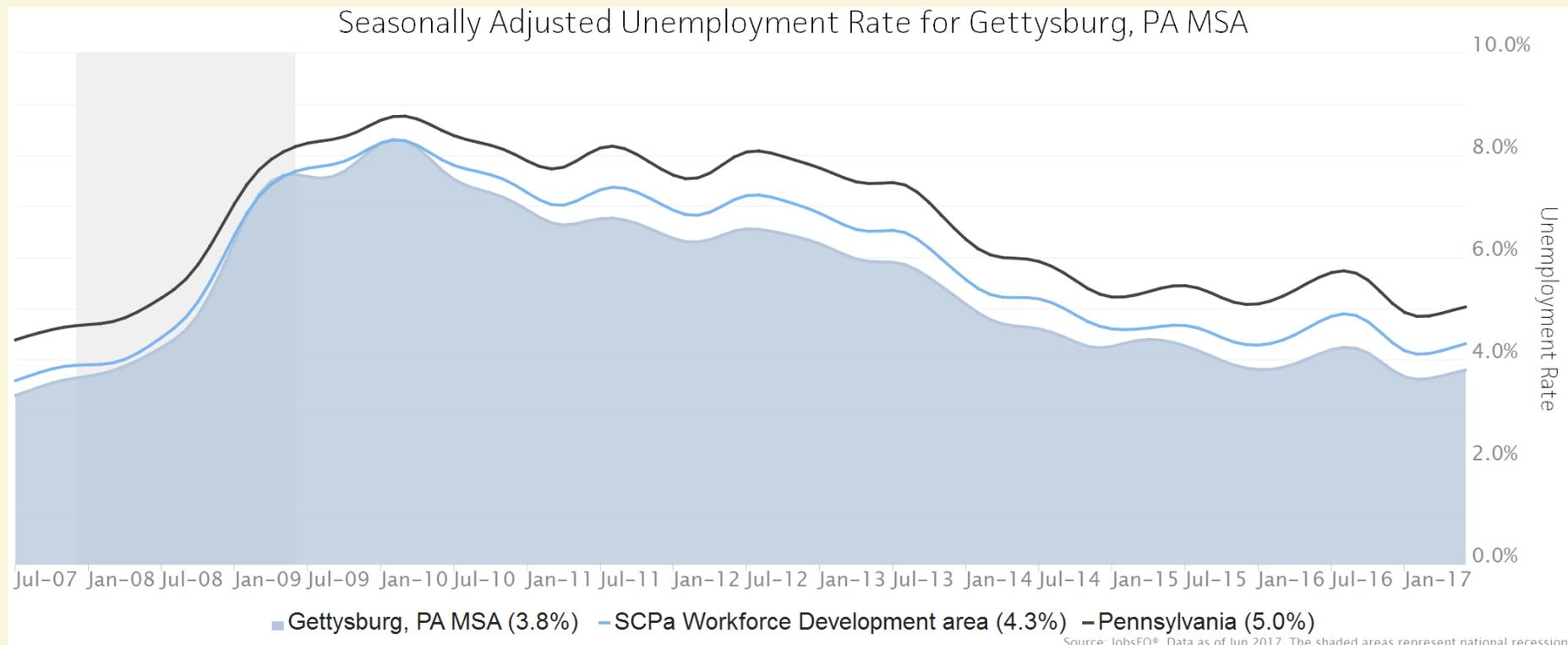
Income

Cost of Living for 2 Adult 2 Child Family



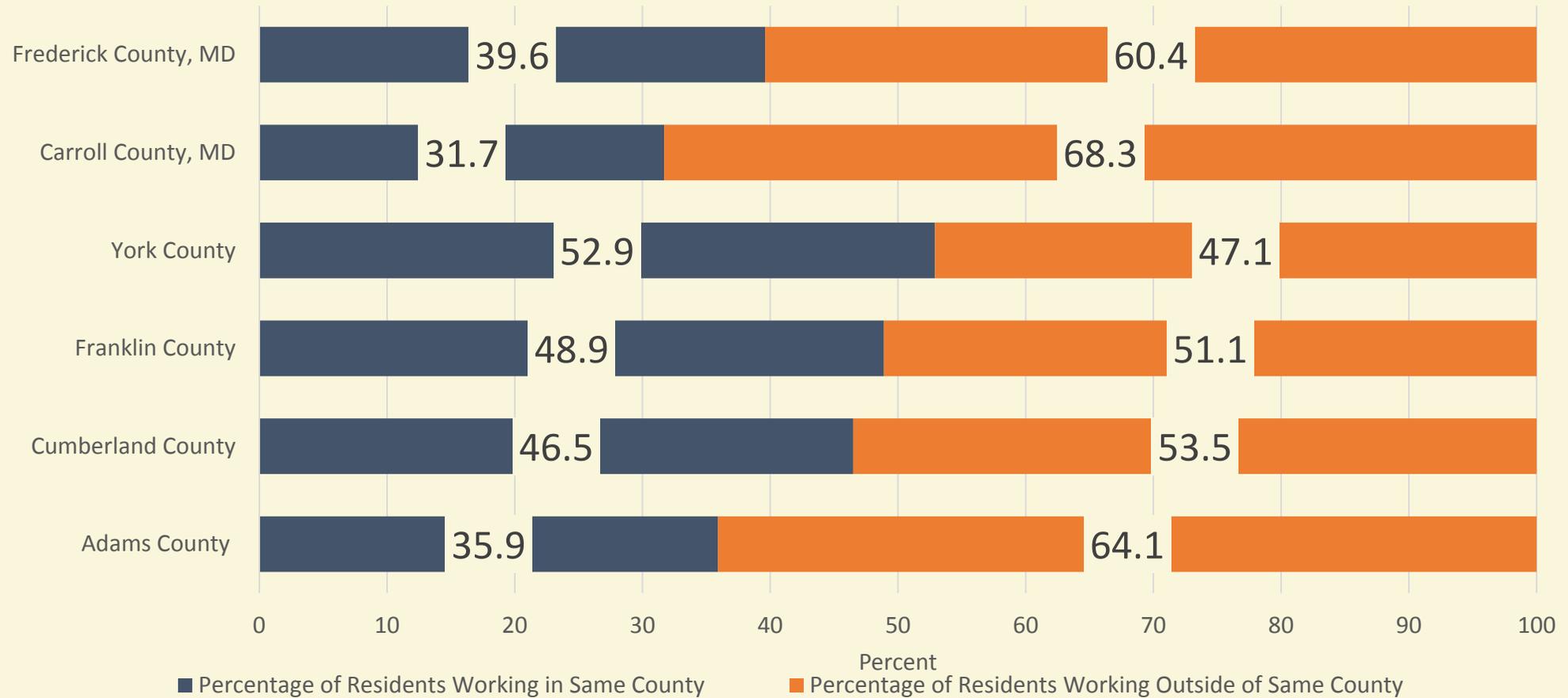
Employment

- Labor Force of 55,900 people living in Adams County
- Employment of 34,145 people working in Adams County



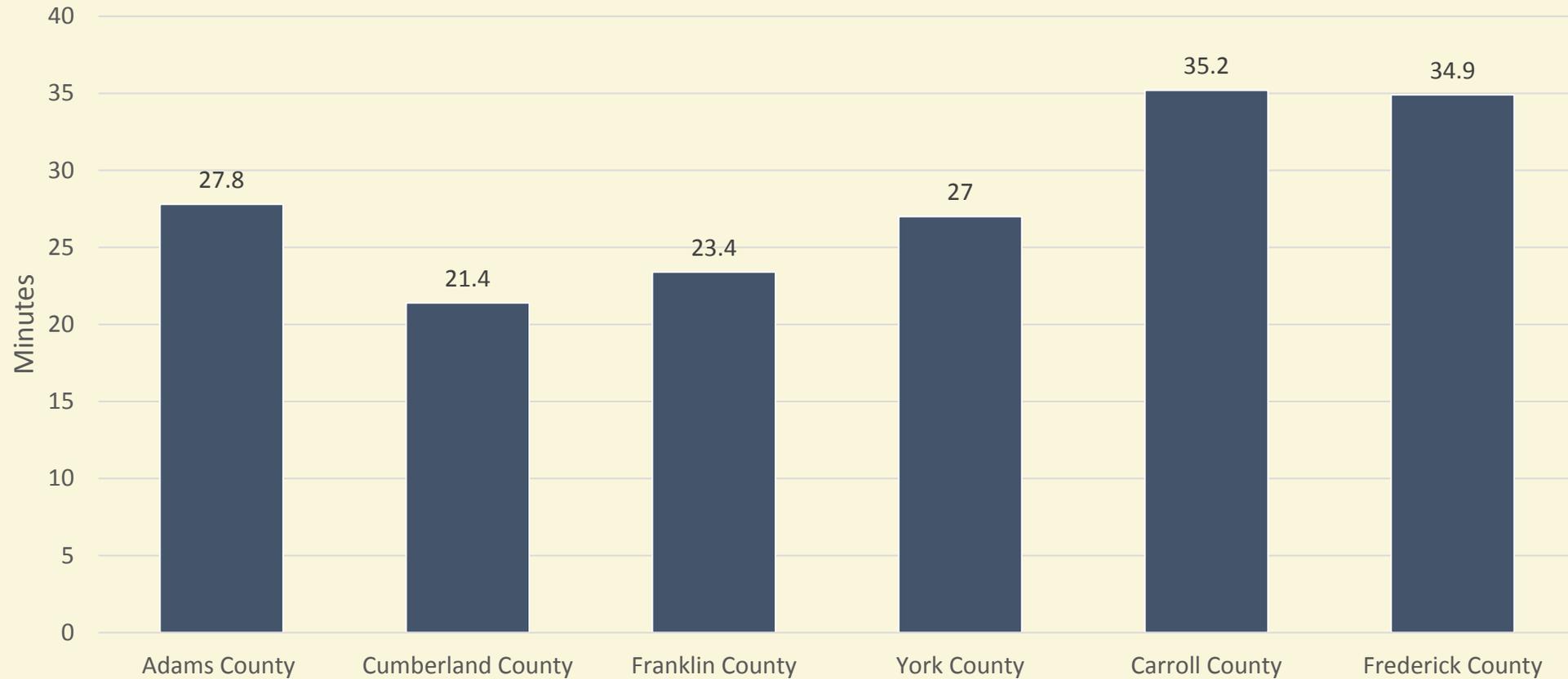
Transportation/Circulation

Place of Work

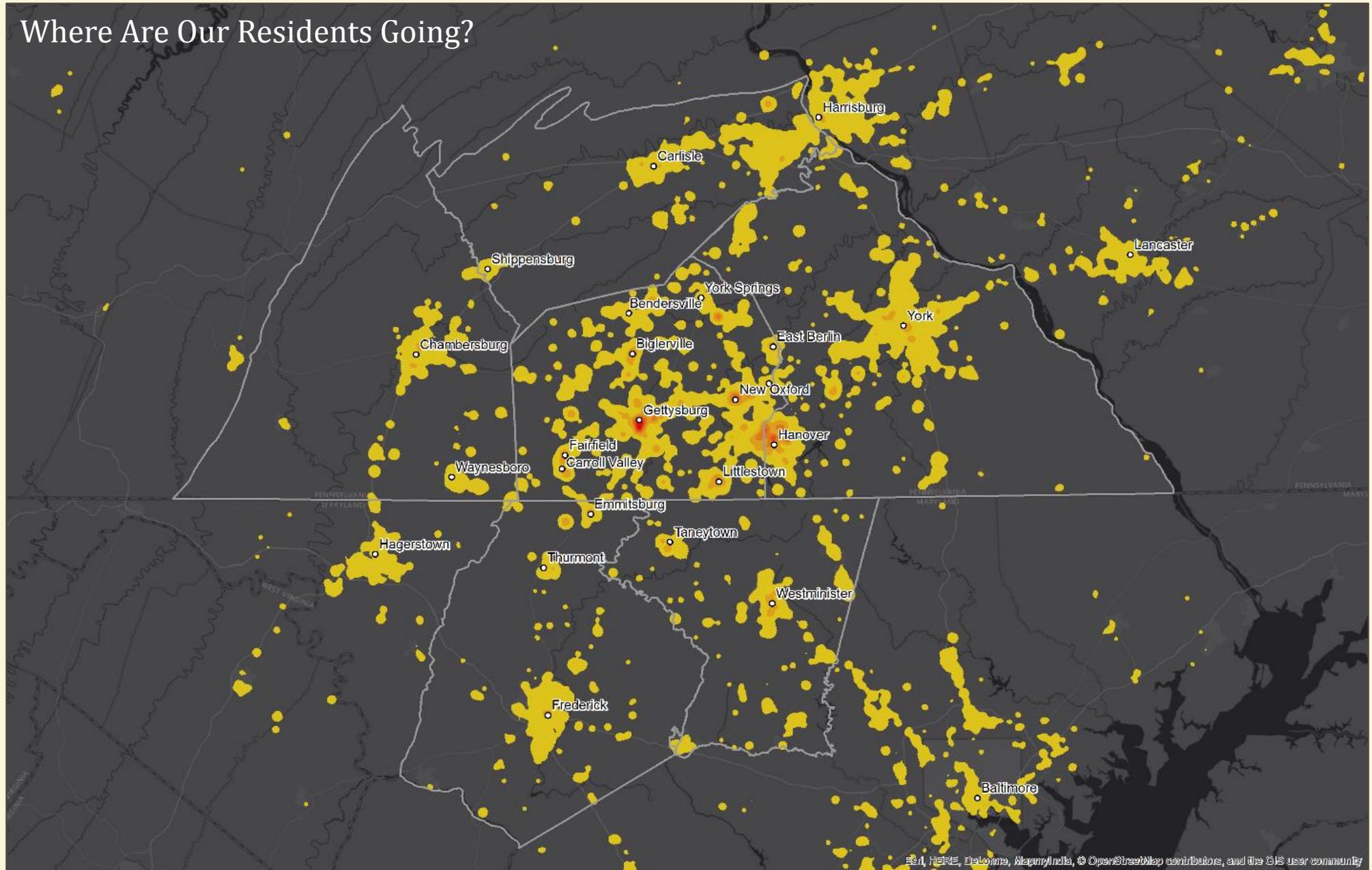


Transportation/Circulation

Average Travel Time to Work

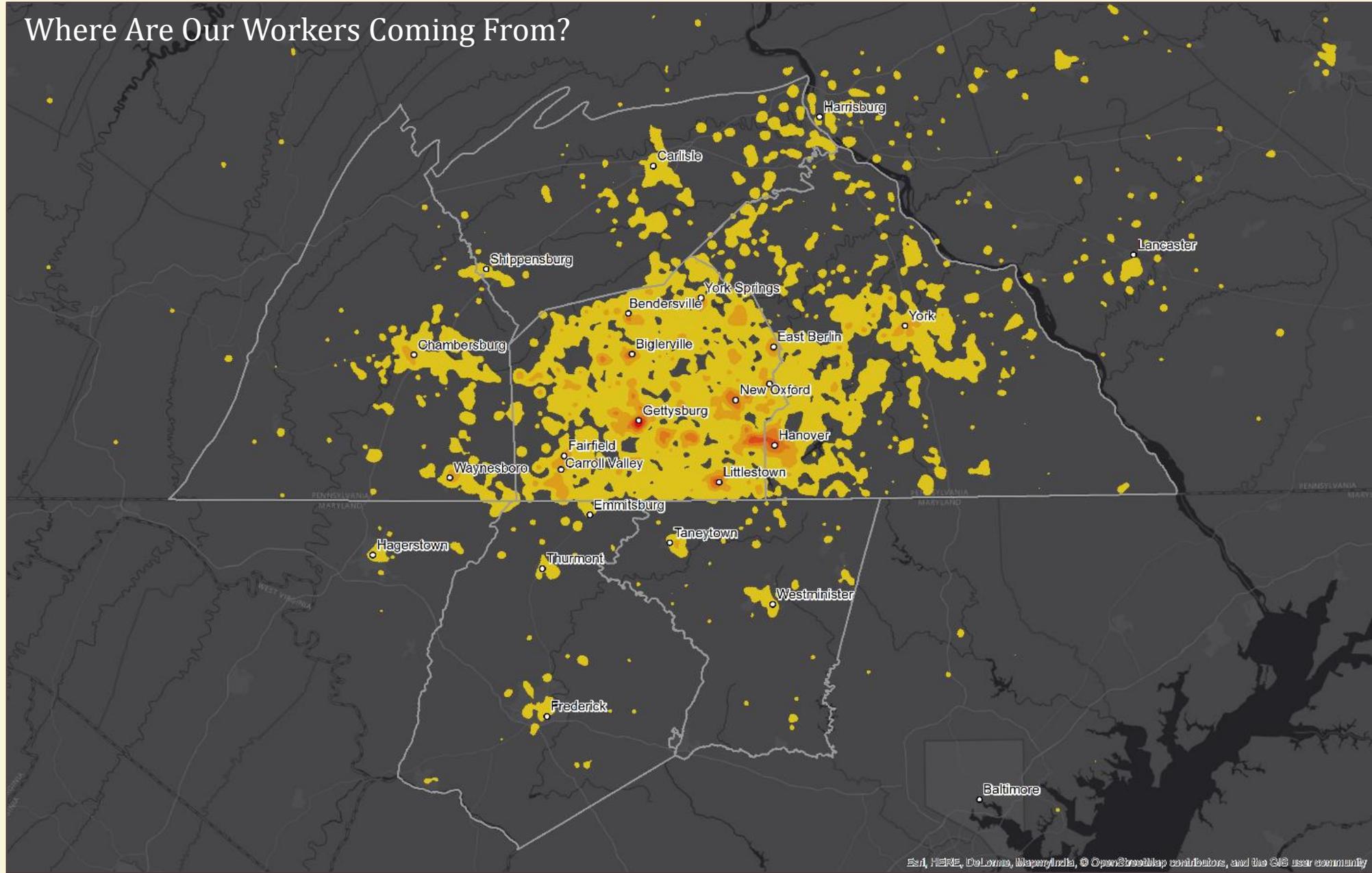


Where Are Our Residents Going?



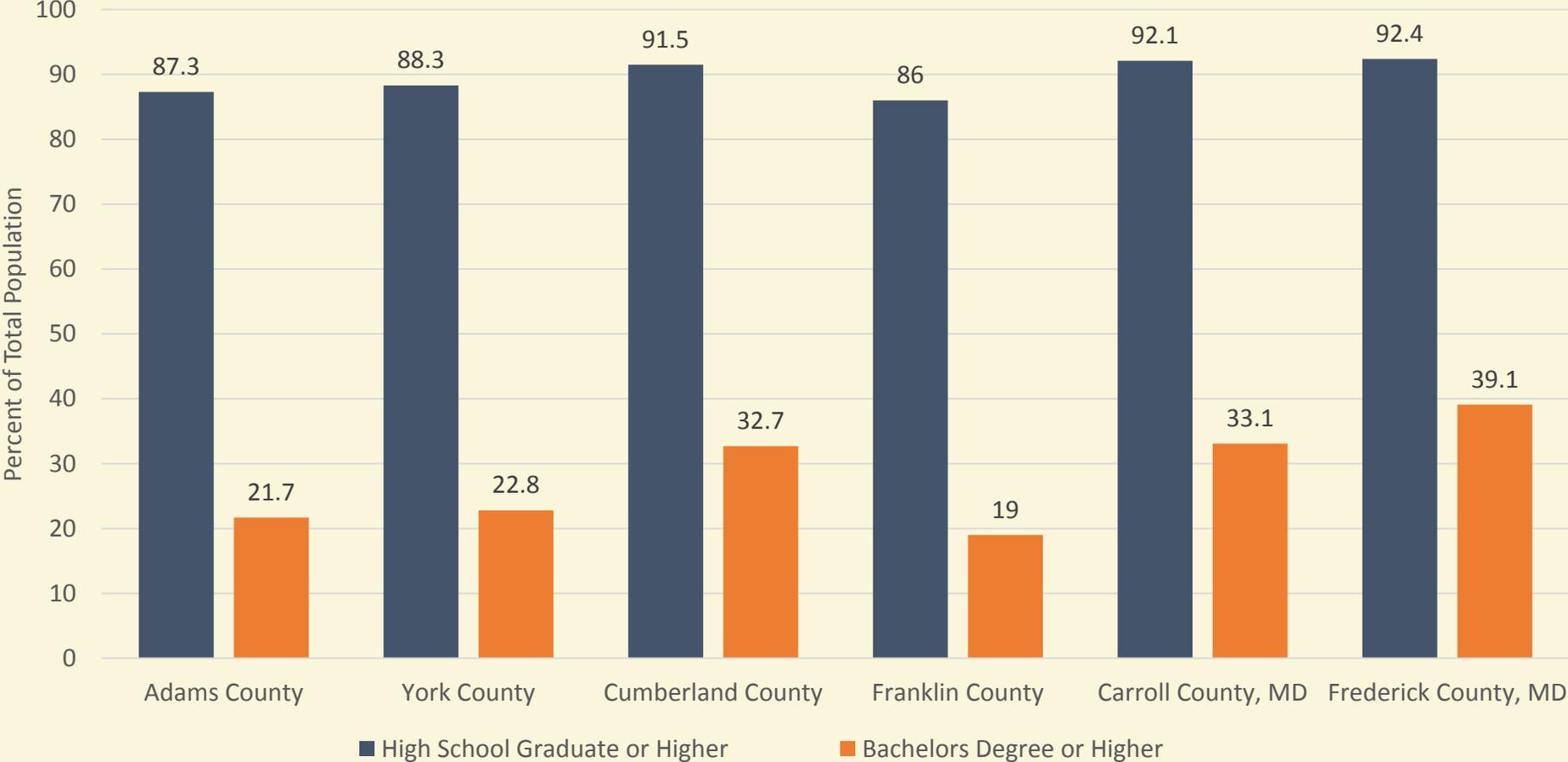
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Where Are Our Workers Coming From?

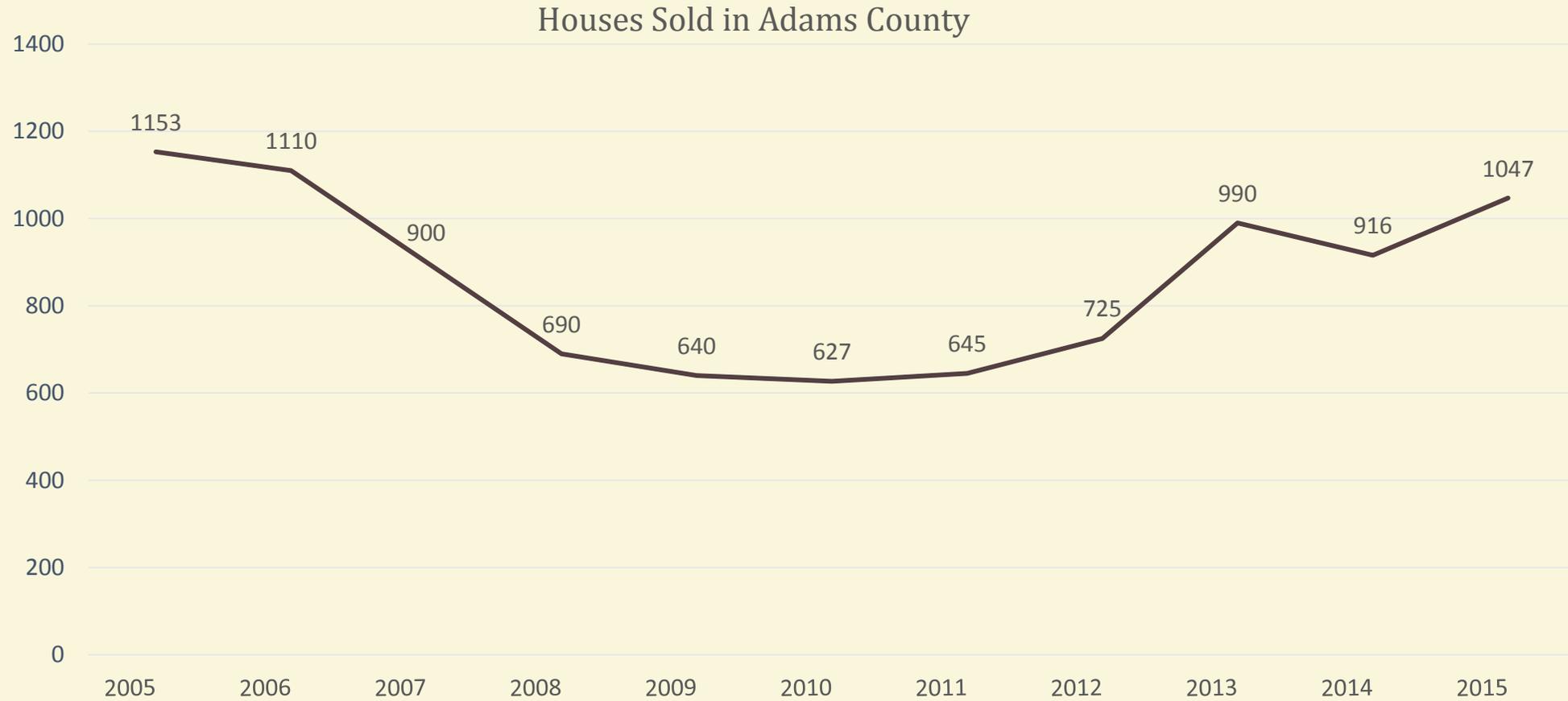


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Educational Attainment

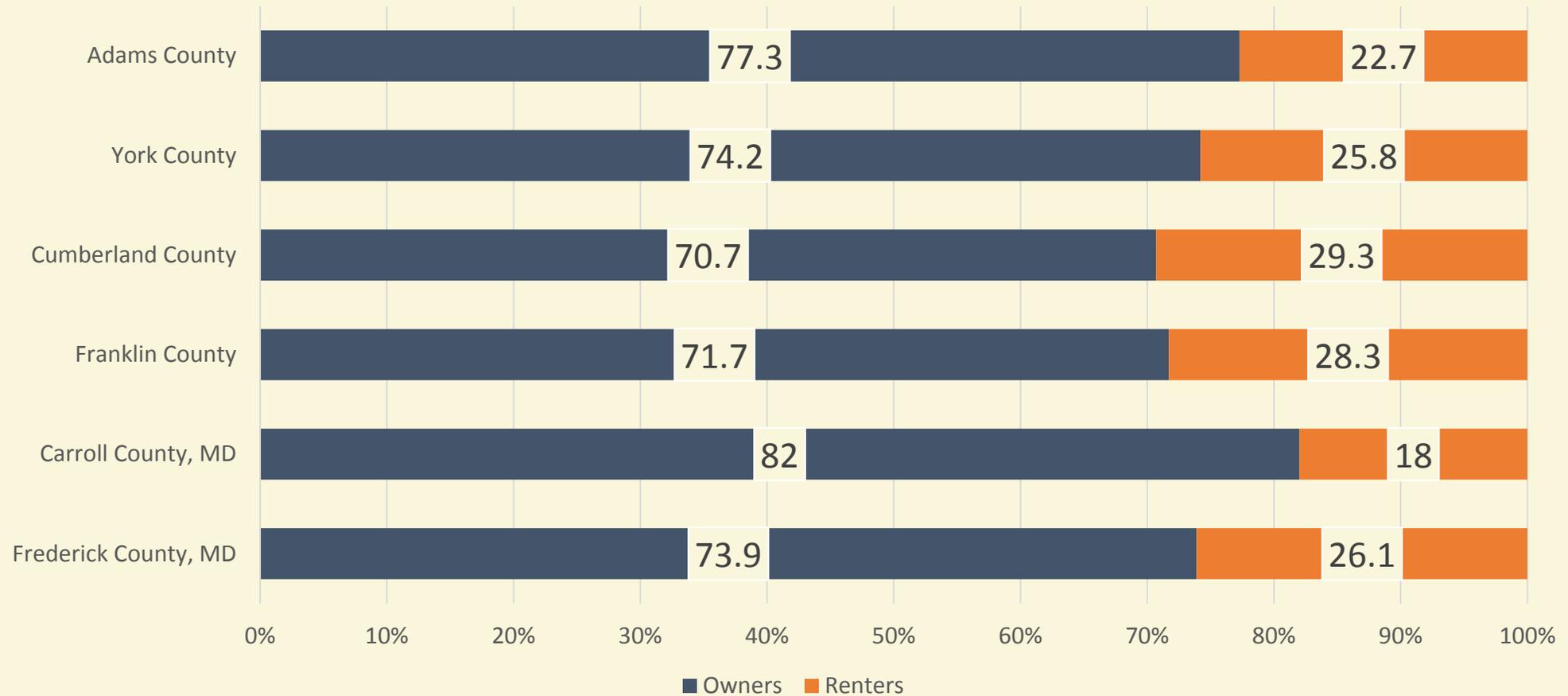


Housing



Housing

Owners vs Renters



Industries (Cluster Analysis)

- A cluster is a regional concentration of inter-related industries.
- Defined by The Brookings Institution as “a group of firms, and related economic actors and institutions, that are located near one another and that draw productive advantage from their mutual proximity and connections.”
- Looking at an economy through groupings of clusters helps us to:
 - Understand and improve the performance of regional economies
 - Orient economic development policy towards groups of firms instead of individual firms
 - Build on unique strengths of the region rather than trying to be like other regions
 - Develop different strategies for different clusters
 - Foster an environment that helps new clusters emerge rather than creating a specific cluster from scratch

Traditional Industry Classifications

Subject	Adams County, Pennsylvania									
	Total		Male		Percent Male		Female		Percent Female	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
Civilian employed population 16 years and over	50,517	+/-594	26,881	+/-457	53.2%	+/-0.7	23,636	+/-433	46.8%	+/-0.7
Agriculture, forestry, fishing and hunting, and mining:	1,588	+/-212	1,265	+/-190	79.7%	+/-4.3	323	+/-76	20.3%	+/-4.3
Agriculture, forestry, fishing and hunting	1,383	+/-211	1,091	+/-185	78.9%	+/-4.6	292	+/-73	21.1%	+/-4.6
Mining, quarrying, and oil and gas extraction	205	+/-69	174	+/-63	84.9%	+/-12.6	31	+/-28	15.1%	+/-12.6
Construction	3,459	+/-300	3,125	+/-251	90.3%	+/-3.2	334	+/-126	9.7%	+/-3.2
Manufacturing	9,420	+/-461	6,642	+/-394	70.5%	+/-2.6	2,778	+/-282	29.5%	+/-2.6
Wholesale trade	1,666	+/-305	1,008	+/-172	60.5%	+/-7.1	658	+/-199	39.5%	+/-7.1
Retail trade	5,650	+/-321	2,904	+/-258	51.4%	+/-3.0	2,746	+/-210	48.6%	+/-3.0
Transportation and warehousing, and utilities:	2,176	+/-230	1,593	+/-207	73.2%	+/-4.9	583	+/-117	26.8%	+/-4.9
Transportation and warehousing	1,907	+/-226	1,348	+/-200	70.7%	+/-5.5	559	+/-117	29.3%	+/-5.5
Utilities	269	+/-92	245	+/-88	91.1%	+/-11.3	24	+/-31	8.9%	+/-11.3
Information	446	+/-99	281	+/-77	63.0%	+/-7.9	165	+/-45	37.0%	+/-7.9
Finance and insurance, and real estate and rental and leasing:	2,038	+/-255	855	+/-140	42.0%	+/-4.6	1,183	+/-178	58.0%	+/-4.6
Finance and insurance	1,385	+/-206	454	+/-91	32.8%	+/-5.3	931	+/-166	67.2%	+/-5.3
Real estate and rental and leasing	653	+/-161	401	+/-115	61.4%	+/-7.7	252	+/-75	38.6%	+/-7.7
Professional, scientific, and management, and administrative and waste management services:	3,086	+/-321	1,652	+/-223	53.5%	+/-4.1	1,434	+/-187	46.5%	+/-4.1
Professional, scientific, and technical services	1,936	+/-252	961	+/-160	49.6%	+/-5.6	975	+/-172	50.4%	+/-5.6
Management of companies and enterprises	4	+/-4	2	+/-3	50.0%	+/-50.0	2	+/-3	50.0%	+/-50.0
Administrative and support and waste management services	1,146	+/-200	689	+/-142	60.1%	+/-7.6	457	+/-123	39.9%	+/-7.6
Educational services, and health care and social assistance:	11,456	+/-414	2,916	+/-240	25.5%	+/-1.9	8,540	+/-388	74.5%	+/-1.9
Educational services	4,673	+/-327	1,645	+/-187	35.2%	+/-2.9	3,028	+/-237	64.8%	+/-2.9
Health care and social assistance	6,783	+/-399	1,271	+/-173	18.7%	+/-2.5	5,512	+/-386	81.3%	+/-2.5
Arts, entertainment, and recreation, and accommodation and food services:	4,466	+/-306	1,858	+/-193	41.6%	+/-4.2	2,608	+/-293	58.4%	+/-4.2
Arts, entertainment, and recreation	982	+/-168	556	+/-138	56.6%	+/-8.2	426	+/-95	43.4%	+/-8.2
Accommodation and food services	3,484	+/-310	1,302	+/-182	37.4%	+/-4.6	2,182	+/-269	62.6%	+/-4.6
Other services, except public administration	2,450	+/-260	1,219	+/-197	49.8%	+/-5.5	1,231	+/-175	50.2%	+/-5.5
Public administration	2,616	+/-257	1,563	+/-209	59.7%	+/-4.4	1,053	+/-138	40.3%	+/-4.4

Employment by Cluster

Cluster Name	Employment
Hospitality and Tourism	5070
Health Services	3903
Food Processing, Manufacturing and Distribution	3303
Real Estate, Construction, and Development	2044
Business/Commercial Services	1884
Distribution and Electronic Commerce	1584
Community and Civic Organizations	1367
Motor Vehicle Products and Services	1257
Transportation and Logistics	1143
Education and Training	1045
Paper and Packaging	870
Retailing of Clothing and General Merchandise	835
Personal Services (Non-Medical)	716
Financial Services	599
Plastics	565
Livestock Processing	435
Printing Services	435
Household Goods and Services	391
Marketing, Design, and Publishing	325
Construction Products and Services	285

Entertainment and Media	232
Vulcanized and Fired Materials	205
Production Technology and Heavy Machinery	205
Automotive	195
Lighting and Electrical Equipment	185
Utilities	180
Industrial Products and Services	155
Metalworking Technology	140
Furniture	140
Wood Products	140
Medical Devices	130
Agricultural Inputs and Services	70
Nonmetal Mining	60
Electric Power Generation and Transmission	60
Downstream Chemical Products	60
Tobacco	60
Performing Arts	50
Insurance Services	45
Financial Services	40
Downstream Metal Products	30
Forestry	20
Information Technology and Analytical Instruments	20
Communications Equipment and Services	20
Textile Manufacturing	20
Upstream Metal Manufacturing	20

Top 50 Employers

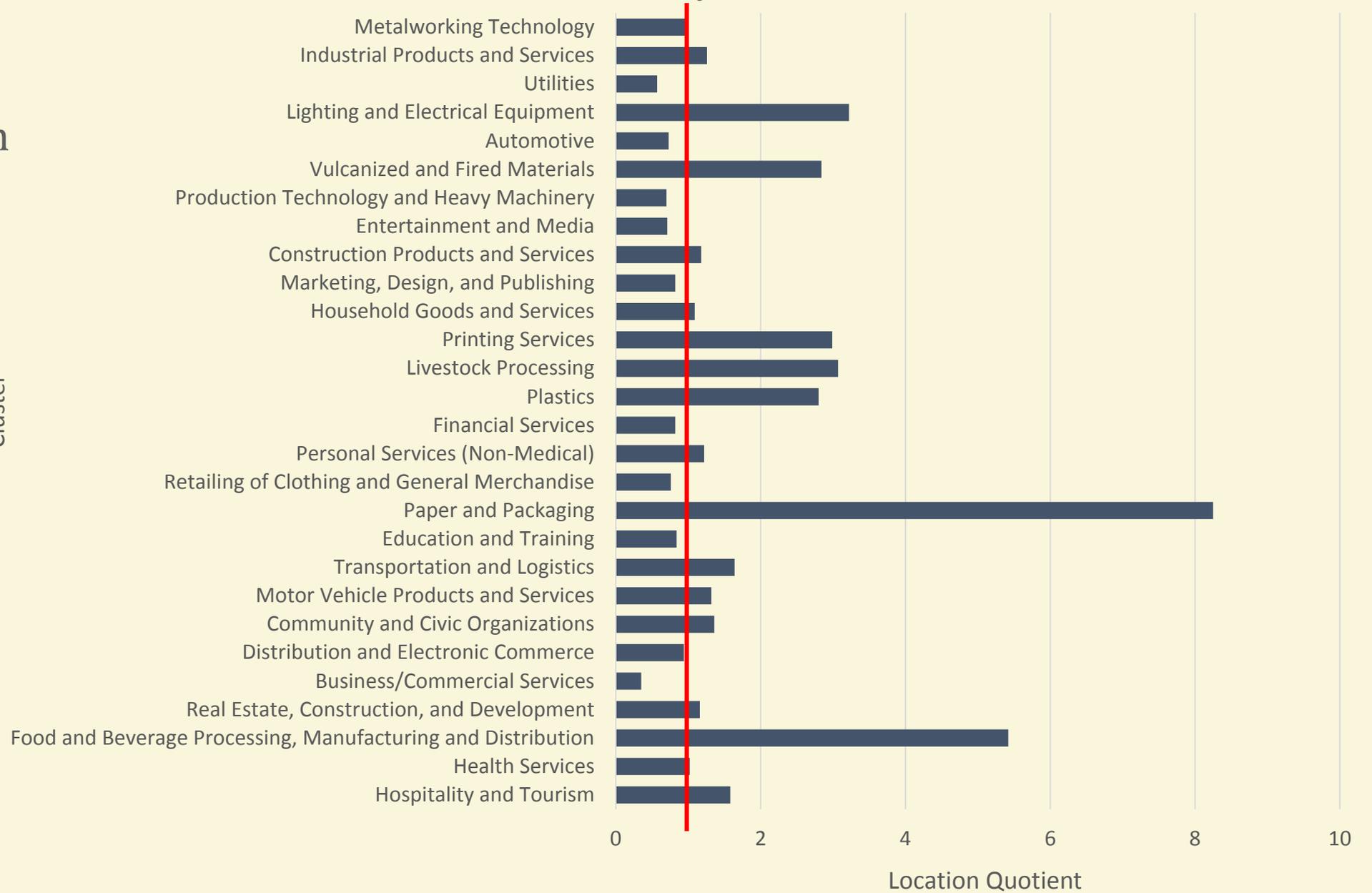
Rank	Top 50 Employers	Cluster
1	Knouse Foods Cooperative Inc	Food Processing and Manufacturing
2	Gettysburg College	Education
3	Ski Liberty Operating Corp	Hospitality and Tourism
4	The Gettysburg Hospital	Health Services
5	Federal Government	Community and Civic Organizations
6	The Brethren Home Community	Health Services
7	Hain Pure Protein Corporation	Livestock Processing
8	Adams County	Community and Civic Organizations
9	Tim-Bar Corporation	Distribution and Electronic Commerce
10	Conewago Valley School District	Education and Training
11	Gettysburg Area School District	Education and Training
12	C&J Clark America Inc	Footwear
13	WellSpan Medical Group	Health Services
14	Pella Corporation	Wood Products
15	World Color Printing (USA) II Corp	Printing
16	Hillandale Gettysburg LP	Food and Beverage Processing and Distribution
17	Littlestown Area School District	Education and Training
18	Kennie's Markets Inc	Food and Beverage Processing and Distribution
19	Mott's LLP	Food Processing and Manufacturing
20	Conewago Enterprises Inc	Real Estate, Construction, and Development
21	Bermudian Springs School District	Education and Training
22	ACNB Bank	Financial Services
23	Aerotek Inc	Business Services
24	Lincoln Intermediate Unit No. 12	Education and Training
25	Diocese of Harrisburg	Community and Civic Organizations

Rank	Top 50 Employers	Cluster
26	Passage Healthcare LLC	Health Services
27	Upper Adams School District	Education and Training
28	Dal-Tile Services Inc	Real Estate, Construction, and Development
29	International Paper Company	Paper and Packaging
30	State Government	Community and Civic Organizations
31	Hoffman Homes Inc	Community and Civic Organizations
32	Wal-Mart Associates Inc	Retailing of Clothing and General Merchandise
33	Giant Food Stores LLC	Food and Beverage Processing and Distribution
34	Utz Quality Foods Inc	Food Processing and Manufacturing
35	Jacoby Transportation Inc	Transportation and Logistics
36	Lutheran Social Services	Community and Civic Organizations
37	Transitions Healthcare Gettysburg	Health Services
38	Rice Fruit Company	Distribution and Electronic Commerce
39	Fairfield Area School District	Education and Training
40	Genlyte Thomas Group LLC	Lighting and Electrical Equipment
41	Haverfield International Inc	Hospitality and Tourism
42	Penn Wood Products Inc	Real Estate, Construction, and Development
43	Specialty Granules Inc	Construction Products and Services
44	True North Wellness Services	Health Services
45	YWCA of Gettysburg & Adams County	Community and Civic Organizations
46	Focus Behavioral Health Inc	Health Services
47	JDCS Enterprise	Hospitality
48	Hanover Prest-Paving Company	Real Estate, Construction, and Development
49	Winter Gardens Quality Foods Inc	Food and Beverage Processing and Distribution
50	Harrisburg Area Community College	Education

Cluster Aggregation

Industry Concentration

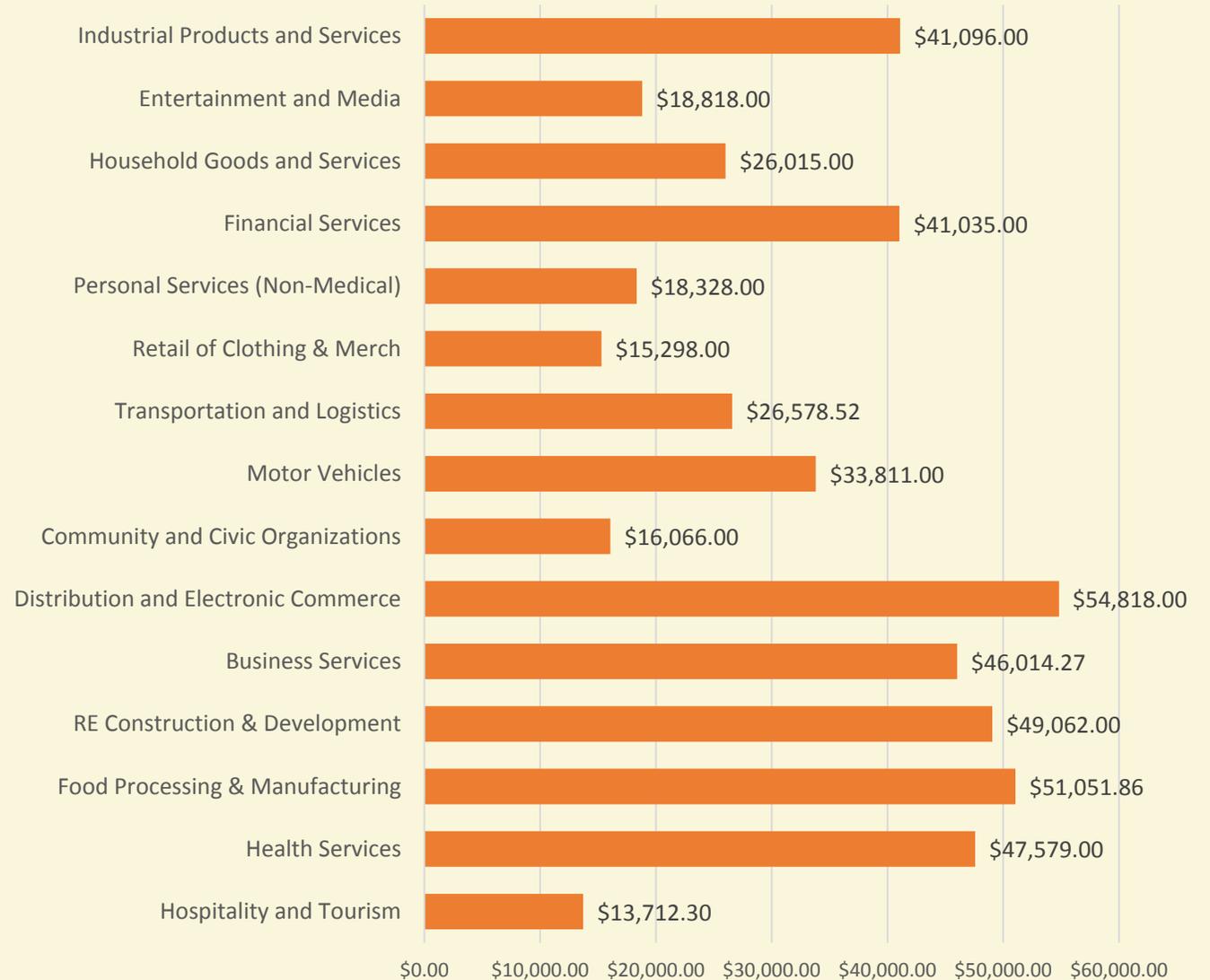
Cluster



Cluster Aggregation

- Average annual wages of clusters in Adams County
- Only includes industries with enough employees (or adequately accurate data gathering) for statistically sound wage analysis

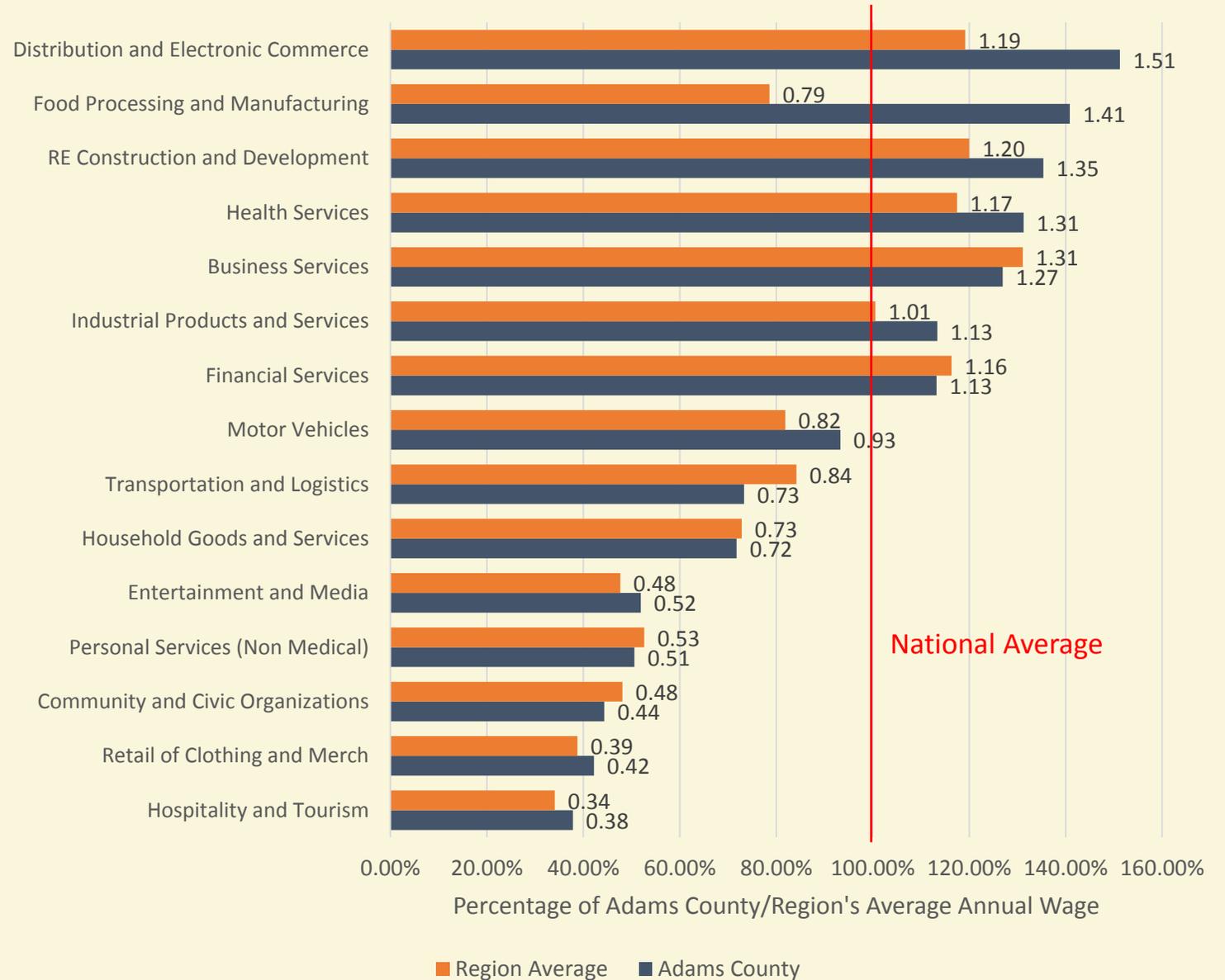
Average Wage by Cluster



Cluster Aggregation

- Average annual wages of clusters compared to Adams County and the Comparison Region
- Only includes industries with enough employees for statistically sound wage analysis
- Example: Adams County's EPF of 1.51 for the Distribution and Electronic Commerce Industry Cluster indicates the average wage for this cluster is 151% of the national average. The average wage of the comparison region is 119% of the national average.

Economic Prosperity Factor



Thank You!

