

York County Development Corporation Target Industries Review November 2016

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Executive Summary

This study identifies a core set of industries as likely candidates for future retention, expansion, and possible recruitment efforts by York County Development Corporation (YCDC). The area included in the study consists of York plus nine nearby counties. Each of the nearby counties either provides at least two percent of workers in York County businesses or abuts York County. Four of the two counties are core metropolitan counties and seven counties are classified as rural.

Information on recent and projected labor force, workforce, and industry trends plus data on occupational and industry wages is used to identify the relative strengths and importance of existing industries and occupations in the study area. Location quotient analysis is used to identify an initial, broad set of industries for further study as possible future drivers of the study area economy. Shift-share analysis for the recent period 2009 to 2015 and projected values for the period 2015 to 2021 is used to identify more detailed, 4-digit North American Industrial Classification System (NAICS) code, industries as possible future drivers of the York County economy. Sales to the core industries by other local businesses are compared to exports and this supply chain analysis identifies possible opportunities for local input substitution.

The core industries identified as possible drivers of the area economy in the location quotient analysis are grouped into eight, broad industry groups:

- (1) Manufacturing Crop and Animal Related Manufacturing;
- (2) Metal, Metal Products, and Machinery Manufacturing;
- (3) All Other Manufacturing;
- (4) Wholesale Trade;
- (5) Transportation and Warehousing;
- (6) Finance and Insurance;
- (7) Professional, Scientific, and Technical Services; and
- (8) Health Care.

Shift share analysis is used to identify 14 more detailed, 4-Digit NAICS codes industries within the six broad groups, as likely to be highly important to the current and future economic vitality of York County. These 14, 4-digit NAICS industries are:

- (1) Animal Food Manufacturing;
- (2) Grain and Oilseed Milling
- (3) Animal Slaughtering and Processing;
- (4) Architectural and Structural Metals Manufacturing;
- (5) Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing;
- (6) Motor Vehicle Body and Trailer Manufacturing;
- (7) Machinery, Equipment, and Supplies Merchant Wholesalers;
- (8) Farm Product Raw Material Merchant Wholesalers;
- (9) Rail Transportation;
- (10) General Freight Trucking;
- (11) Specialized Freight Trucking;
- (12) Agencies, Brokerages, and Other Insurance Related Activities;
- (13) Legal Services; and
- (14) Offices of Other Health Practitioners.

Additionally, 17 industries rated as highly important potential targets in the rural counties only are identified for possible future study:

- (1) Sawmills and Wood Preservation;
- (2) Agriculture, Construction, and Mining Machinery Manufacturing;
- (3) Other Wood Product Manufacturing;
- (4) Cement and Concrete Product Manufacturing;
- (5) Aerospace Product and Parts Manufacturing;
- (6) Medical Equipment and Supplies Manufacturing;
- (7) Miscellaneous Durable Goods Merchant Wholesaler;
- (8) Petroleum and Petroleum Products Merchant Wholesaler;
- (9) Support Activities for Road Transportation;
- (10) Warehousing and Storage;
- (11) Depository Credit Intermediation;
- (12) Securities and Commodity Contracts Intermediation;
- (13) Management, Scientific, and Technical Consulting;
- (14) Scientific Research and Development Services;
- (15) Advertising, Public Relations, and Related;
- (16) Offices of Physicians; and
- (17) Outpatient Care Centers.

Industries identified as targets for import substitution are:

- (1) Other Motor Vehicle Parts Manufacturing;
- (2) Rail Transportation;
- (3) Specialized Freight (Except Used Goods) Trucking, Long Distance;
- (4) Wired Telecommunications Carriers;
- (5) Commercial Banking;
- (6) Insurance Agencies and Brokerages;
- (7) Lessors of Residential Buildings and Dwellings;
- (8) Lessors of Nonresidential Buildings (except Miniwarehouses);
- (9) Other Commercial and Industrial Machinery and Equipment Rental and Leasing;
- (10) Offices of Certified Public Accounts; and
- (11) Janitorial Services.

Information on York County's retail sector is also provided in Appendix A, *Retail Leakages, City of York and Peer Communities, September 2016* at the end of this study. Median wages that are lower than average area wages was the primary reason industries in the Retail and Accommodations sectors did not meet the criteria for potential targets. Given the Retail Trade sector's large size and strong pull factors, YCDC may want to consider efforts to retain and expand firms in this industry.

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Introduction

The purpose of this study is to provide York County Development Corporation (YCDC) with information to be used as part of a process to identify industries for future retention, expansion, and possible recruitment efforts. Additional information that may be used in this targeting process includes insights of YCDC and community members plus possible further investigations conducted by YCDC.

This report contains information on the relative sizes and trends, both recent and projected, of area industries and labor forces plus information on interactions between the York County economy and the economies of counties linked to it by commuting patterns. Industries that are key drivers of York County's recent economic growth, that are expected to be future drivers of economic growth, and that appear to have potential to become drivers of the area economy are identified in this study. Also identified are industries that are currently highly important to the area's economic health but may be at risk due to expected declines in overall national employment.

Methodology

U.S. Census Department's Bureau of the Census and Economic Modeling Specialist International (EMSI) are the primary sources of information for this study. EMSI, a private data vendor, collects and analyzes data from a variety of public sources, including the U.S. Census Department, the U.S. Department of Labor, and the U.S. Department of Education. EMSI uses this information to derive estimates of local data suppressed by government agencies to protect proprietary information. Data from EMSI enables a level of analysis that would not be possible in many Nebraska counties due to high levels of data suppression common in areas of relatively small population. NPPD subscribes to EMSI data services and provides this information to wholesale and retail customers as part of its economic development services to these communities.

Data from the U.S. Census Bureau's OnTheMap Application have been used to identify nine counties closely linked to York County based on proximity or commuting patterns. Seven of these counties are adjacent to York County. The remaining two are close by and each provide at least three percent of the primary jobs held by York County residents.

Two of the nine counties are core metropolitan counties (Core Metro). York and the remaining seven counties are classified as rural. For the analysis of area industries workforces and labor forces data, the seven rural counties are usually combined into a single group (Rural Counties) and information for York County is reported separately. In the analysis of potential key or target industries, information about York County is combined with the other Rural Counties (York Plus Rural Counties).

Information on recent and projected labor force, workforce, and industry trends plus data on occupational and industry wages is reported for the Core Metro Counties, Rural Counties, and York County. This information is used to identify the relative strengths and importance of existing industries and occupations in the Core Metro Counties and the York Plus Rural Counties groups.

Location quotient analysis, using past, present, and projected future employment, wages and gross regional product, is used to identify an initial, broad set of industries for further study as possible drivers of the study area economy. Shift-share analysis for the periods 2009 to 2015 and 2015 to 2021 is used to classify more detailed, 4-digit North American Industrial Classification System (NAICS) code, industries as important drivers of area economies, potential drivers of area economies, important industries with national trends of declining employment and other industries. The other industries group includes businesses that primarily support local population such as retail trade, construction, personal service, plus education.

Lastly, sales to key industries and to industries identified as having the potential to become key industries by businesses outside the study area are compared to exports by similar local businesses. This supply chain analysis identifies possible opportunities for local input substitution.

Study Area and Commuting Patterns

The geographic area selected for this study is based on the proximity to York County and commuting data from the U.S. Census Bureau’s OnTheMap Application. As shown in Table One below and Figure One on the following page, seven counties (Butler, Clay, Fillmore, Hamilton, Polk, Saline, and Seward) abut York County. Lancaster and Hall counties are both in close proximity and easily accessed via Interstate 80. Each of these core metropolitan counties provides at least three of York County’s workers.

As shown in Table One, York County is the location of primary jobs for 3,532 or 54.7 percent of the county’s employed residents. The nine other counties in Table One provide primary jobs for 1,712 or 26.5 percent of York County’s employed residents. Also shown in Table One, York County provides 52.6 percent of the workers for primary jobs within the county. The nine other counties in Table One provide, 1,675 or 24.9 percent of York County’s primary job workers.

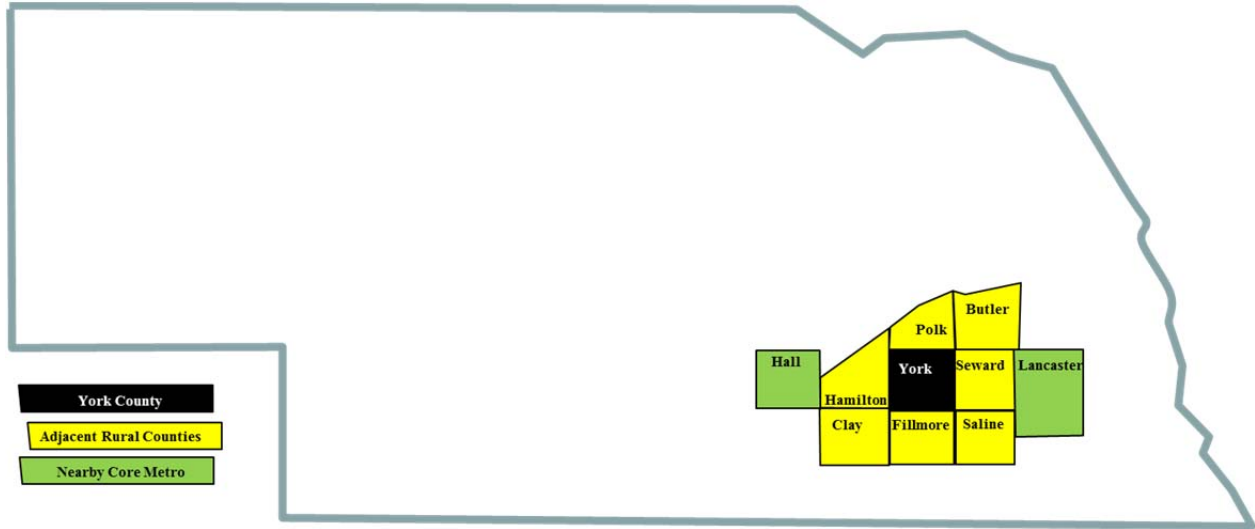
Table One also shows **York County is a net importer of labor** and has 262 or 3.9percent more primary jobs within the county than residents working at primary jobs.

Table One
Worker Inflows and Resident Outflows, 2014

Nebraska County	Where York County Workers Live		Where York County Residents are Employed	
	Number	Percent	Number	Percent
York	3,532	52.6%	3,532	54.7%
Lancaster	321	4.8%	742	11.5%
Seward	261	3.9%	232	3.6%
Fillmore	249	3.7%	115	1.8%
Polk	241	3.6%	89	1.4%
Hamilton	221	3.3%	136	2.1%
Hall	210	3.1%	280	4.3%
Saline	88	1.3%	59	0.9%
Butler	45	0.7%	25	0.4%
Clay	39	0.6%	34	0.5%
All Other	1,508	22.5%	1,209	18.7%
Total	6,715	100.0%	6,453	100.0%

Source: U.S. Census Bureau, OnTheMap Application, <http://onthemap.ces.census.gov>

Figure One
Study Area



Source: U.S. Census Bureau, OnTheMap Application, <http://onthemap.ces.census.gov>.

Two of the counties in the study (Lancaster and Hall) are core metropolitan counties (Core Metro). York and the remaining seven counties (Butler, Clay, Fillmore, Hamilton, Polk, Saline, and Seward) are classified as rural. For the analysis of area industries, workforces, and labor forces data, the seven rural counties are typically combined into a single group (Rural Counties) and information for York County is reported separately. In the analysis of potential key or target industries, information about York County is combined with the other Rural Counties (York Plus Rural Counties).

Study Area – Labor Force

The size, skills composition, and recent and projected trends of an area’s labor force are critical to a community’s efforts to retain, grow, and attract businesses that offer superior compensation packages. An evaluation of a region’s current and potential employee pool is a critical step in identifying industries that will be a good fit and promote future growth.

The traditional definition of a labor force is the people living within an area, e.g., York County residents, 16-years of age or older that are either working or actively seeking employment. The labor force may work at locations within or outside their area of residence. In addition to the traditional definition of labor force, the U.S. Department of Labor publishes information on discouraged workers and underemployed workers at the state and national levels.

This section provides information on the demographic characteristics of York County’s, Rural Counties’, and Core Metro Counties’ populations and labor force.

Population Growth and Components of Growth

Typical of most rural Nebraska counties, both York County and the six Rural Counties have experienced recent population declines while Core Metro Counties and Nebraska, statewide experienced population increases. As shown in Table Two, York County’s population declined by 681 people or 4.7 percent from 2000 to 2014. While the county was able to achieve a natural increase, births minus deaths, of 487 people, net out-migration resulted in the loss of 1,168 people. This out-migration was equal to 8.0 percent of 2000 population. The seven Rural Counties also experienced substantial declines with a total population loss of 1,882 or 2.8 percent including a natural decrease of 864 and net out-migration of 2,746. **Continued loss of population erodes an area’s tax base, makes it difficult to maintain current employment levels, and places future growth at risk.**

Table Two
Population Change by Areas and Total, 2000–2014

Area	Population		Population Change 2000–2014		Natural Increase 2000-2014	Net Migration 2000–2014	
	2000	2014	Number	Percent		Number	Percent
York County	14,598	13,917	-681	-4.7	487	-1,168	-8.0
Rural Counties	67,915	66,033	-1,882	-2.8	864	-2,746	-4.0
Core Metro	335,393	395,953	60,560	18.1	43,490	17,070	5.1
Target Area Total	417,906	475,903	57,997	13.9	44,841	13,156	3.1
Nebraska	1,711,263	1,881,503	170,240	9.9	178,301	-8,061	-0.5

Source: U.S. Bureau of the Census, Census of Population, May 2016

When measured by population growth, the Core Metro Counties performed much better than York County and the state as a whole over the period 2000 to 2014. During the period 2000 to 2014, Core Metro County population increased by 60,560 or 18.1 percent, which was almost twice the 9.9 percent increase for the state as a whole. During the same 14-year period, net in-migration for the Core Metro Counties was equal to 5.1 percent of 2000 population while Nebraska as a whole experienced out-migration of approximately 0.5 percent.

The close proximity of growing population centers provides both a challenge and an opportunity for York County. Growing counties provide a potential source of workers to support the expansion of local businesses but also offer a nearby alternative to families considering relocating to another area with similar life styles. **Data from Table One, presented earlier, suggests York County relies on other counties for substantial numbers of both workers and jobs for its residences; but, overall, experiences a relatively small net inflow of workers.**

Population Age Profile

The age distribution of its population is another important factor in assessing the ability of an area to support future business and economic growth. Table Three contains information on the size and distribution of population by study area for important age groups.

As shown in Table Three, the proportion of population in the youngest age group 0 to 14 years of age is relatively similar across all three of the areas and ranges from 19.2 percent for the Rural Counties to 20.1 percent for the Core Metro Counties. However, the proportion of residents in the oldest age group, 65 Plus, is much higher for York County, 19.0 percent, and the Rural Counties, 18.3 percent, than for the Core Metro Counties, 12.9 percent. **The age distributions in Table Three suggest a large portion of past out-migration from York County and the Rural Counties occurred among students and families headed by adults in the highly productive age group of 25 to 54 years of age.**

**Table Three
Age Profiles by Areas and Total, 2015**

Age Group	York County		Rural Counties		Core Metropolitan		Study Area Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
0 to 14	2,686	19.5	12,608	19.2	73,845	20.1	89,139	19.9
15 to 24	1,793	13.0	9,596	14.6	65,703	17.8	77,092	17.2
25 to 54	4,751	34.4	22,403	34.0	138,537	37.6	165,691	37.0
55 to 64	1,951	14.1	9,165	13.9	42,736	11.6	53,852	12.0
65 Plus	2,625	19.0	12,055	18.3	47,327	12.9	62,007	13.8
15 to 64	8,495	61.5	41,164	62.5	246,976	67.1	296,635	66.2
Total	13,806	100.0	65,827	100.0	368,148	100.0	447,781	100.0

Source: U.S. Bureau of the Census, Census of Population, May 2016

As shown in Table Four, York (103.7 percent) and Hall (97.5 percent) are the only counties within the study area where the number of jobs exceeds 90.0 percent of local population in the prime working ages of 15 to 64. As noted earlier, Hall is one of two core metropolitan counties in the study area. **This information suggests York County may be more dependent on imported labor than the net commuter data in Table One indicates.**

Table Four
2015 Jobs as a Percent of 2014, Population Ages 15 to 64

County	Jobs 2015	2015 Jobs Percent of 2014 Population	2015 Jobs as a Percent 2014 Population Ages 15 to 64
York	8,807	63.8%	103.7%
Butler	3,370	41.5%	68.8%
Clay	3,285	52.1%	86.6%
Fillmore	2,712	48.3%	78.0%
Hall	37,737	61.2%	97.5%
Hamilton	4,252	46.3%	74.3%
Lancaster	182,691	59.6%	87.7%
Polk	1,950	37.5%	61.8%
Seward	7,815	45.7%	71.5%
Saline	7,854	55.0%	85.4%

Sources: U.S. Bureau of the Census, Census of Population, May 2016
Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Population Educational Attainment Profile

An area's ability to support current and future industry expansions and attract new business formations or relocations is heavily dependent on the quality and quantity of workers and their current skill sets. Unfortunately, most of the data on workers' skills is collected from the local workforce, much of which often comes from areas other than the county, e.g., York County, or region being studied. The lack of information about the skills of the resident population makes educational attainment the default metric for evaluation of the potential skills and quality of an area's labor force. This information is often supplemented with interviews of local employers to ascertain the availability and quality of important skills.

As shown in Table Five on the following page, York (93.5 percent of residents 25 years of age and older), Core Metro (91.6 percent), and the other rural counties (90.0 percent) have high percentages of residents with at least a high school diploma. York and the Core Metro counties average exceed the state average of 90.5 percent, while the Rural County average is slightly lower.

York County's percentage of residents aged 25 and over with a bachelor's degree or higher (24.1 percent) is higher than the average of the other rural counties (20.1 percent) but well below the average for the Core Metro Counties (33.0 percent) and the state (29.0 percent).

York County has a very competitive, rural labor force as measured by educational attainment at the High School degree level. However, the percent of residents with at least a bachelor’s degree may limit the county’s ability to sustain and compete for some businesses that require a significant number of professional workers.

Table Five
Educational Attainment, 2010–2014, 5-Year Estimates

Attainment	Target County		Rural Counties		Core Metro		Target Area Total		Nebraska	
	NUM	PER	NUM	PER	NUM	PER	NUM	PER	NUM	PER
Total; Estimate; Population 25 years and over -	9,395	100.0	43,631	100.0	220,436	100.0	273,462	100.0	1,205,229	100.0
Less than 9th grade	197	2.1	1,952	4.5	7,898	3.6	10,047	3.7	49,414	4.1
9th to 12th grade, no diploma	413	4.4	2,415	5.5	10,675	4.8	13,503	4.9	63,877	5.3
High school graduate (includes equivalency)	3,222	34.3	14,678	33.6	54,028	24.5	71,928	26.3	335,054	27.8
Some college, no degree	2,236	23.8	10,152	23.3	51,230	23.2	63,618	23.3	289,255	24.0
Associate's degree	1,062	11.3	5,665	13.0	23,745	10.8	30,472	11.1	116,907	9.7
Bachelor's degree	1,616	17.2	6,041	13.8	47,820	21.7	55,477	20.3	236,225	19.6
Graduate or professional degree	648	6.9	2,714	6.2	24,858	11.3	28,220	10.3	113,292	9.4
Total; Estimate; High school graduate or higher	8,784	93.5	39,262	90.0	201,863	91.6	249,909	91.4	1,090,732	90.5
Total; Estimate; Bachelor's degree or higher	2,264	24.1	8,766	20.1	72,639	33.0	83,669	30.6	349,516	29.0

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates.

Income and Poverty

Information in Table Six suggests the income level of York County residents is similar to that of the Rural Counties, the Core Metro Counties and Nebraska as a whole. The most recent data available from 2014 shows York County median household income, \$50,922, is higher than three of the other seven Rural Counties, one of the two Core Metro Counties, and is 97.2 percent of the state average of \$52,400. York County per capita income of \$28,271 is higher than four of the seven Rural Counties, both of the Core Metro Counties and is 3.4 percent higher than the state average of \$27,399.

The proportion of York County residents living below the poverty level, 9.6 percent in the recent surveys, is the third highest among the eight rural counties. However, both Core Metro Counties have poverty rates that are over 50 percent higher than York County’s and the statewide poverty rate is almost 35 percent higher.

When an area’s full time employment is defined as the percentage of its population ages 16 to 64 working at least 35 hours per week, York County, 55.5 percent, is slightly higher than the statewide average of 55.2 percent, but third lowest among the eight rural counties in the study. Interestingly, there is little correlation between these area’s full time employment rates and income levels.

Table Six
Income, Poverty Rates, and Hours Worked by County, Areas, and Total

Area	Median household income in the past 12 months (in 2014 Inflation-adjusted dollars)	Per capita income in the past 12 months (in 2014 Inflation-adjusted dollars)	Percentage of all persons living below poverty level	Percent of 16 to 64 years; that usually worked 35 or more hours per week - 50 to 52 weeks
York	50,922	28,271	9.6	55.5
Rural Counties				
Butler	49,241	28,525	8.9	59.7
Clay	50,682	25,664	10.1	59.3
Fillmore	52,063	26,873	8.4	64.9
Hamilton	58,382	28,982	9.1	60.2
Polk	54,375	29,567	8.4	60.1
Saline	46,814	21,230	13.0	50.3
Seward	59,503	27,579	9.0	52.7
Core Metro				
Hall	49,178	24,075	15.7	55.6
Lancaster	51,916	27,512	14.9	52.2
Nebraska	52,400	27,339	12.9	55.2
United States	53,482	28,555	15.6	47.1

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates.

Study Area – Workforce

While data about an area’s labor force describe the characteristics of local residents, analysis of an area’s workforce provides information about workers at local businesses, regardless of where they live.

Analysis of workforce data provides insights into the types of businesses that have been and are likely to be successful within a region. Table Seven below provides information on the relative size as measured by size of 2015 employment, relative compensation paid as indicated by 2015 average earnings inclusive of benefits, and productivity as measured by 2014 gross regional product for very broad categories of York County businesses.

Table Seven
York County
2015 Employment, 2015 Earnings & 2014 Gross Regional Product by Industry

NAICS	Description	2015 Employment		2015 Average	2014 Gross Regional Product	
		Number	Percent	Earnings \$	Level 1,000\$	Percent
11	Crop and Animal Production	439	5.4	49,414	65,614	10.6
21	Mining, Quarrying, and Oil and Gas Extraction	<10	NA	NA	2,179	0.4
22	Utilities	<10	NA	NA	2,673	0.4
23	Construction	340	4.2	53,879	28,439	4.6
31	Manufacturing	827	10.1	62,501	111,012	17.9
42	Wholesale Trade	504	6.2	63,726	74,219	11.9
44	Retail Trade	883	10.8	28,061	39,141	6.3
48	Transportation and Warehousing	198	2.4	45,357	14,342	2.3
51	Information	80	1.0	44,416	8,793	1.4
52	Finance and Insurance	375	4.6	52,930	57,178	9.2
53	Real Estate and Rental and Leasing	18	0.2	33,056	8,714	1.4
54	Professional, Scientific, and Technical Services	209	2.6	58,903	17,572	2.8
55	Management of Companies and Enterprises	<10	NA	NA	228	0.0
56	Administrative and Support and Waste Management and	295	3.6	41,701	16,504	2.7
61	Educational Services	306	3.8	31,645	11,835	1.9
62	Health Care and Social Assistance	1,088	13.3	43,457	51,185	8.2
71	Arts, Entertainment, and Recreation	55	0.7	19,592	1,609	0.3
72	Accommodation and Food Services	800	9.8	16,321	20,291	3.3
81	Other Services (except Public Administration)	471	5.8	25,306	16,105	2.6
90	Government	1,257	15.4	51,867	73,924	11.9
	Total	8,158	100.0	43,385	621,555	100.0

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

As shown in Table Seven above, NAICS 31, Manufacturing; NAICS 42, Wholesale Trade; NAICS 62, Health Care and Social Assistance; and NAICS 90, Government, which includes public power utilities, account for 45.0 percent, 3,676, of 2015 jobs and 49.9 percent of the 2014 gross regional product in York County. Average Earnings (total compensation) for NAICS 31, Manufacturing, \$62,501, NAICS 42, Wholesale

Trade, \$63,726, and NAICS 90, Government, \$51,867 are well above the York County average of \$43,385 while average earnings for NAICS 62, Health Care and Social Assistance, \$43,457 is virtually the same.

Table Eight provides the same information as Table Seven for the seven Rural Counties in the study area. NAICS 31, Manufacturing, NAICS 42, Wholesale Trade, NAICS 62, Health Care and Social Assistance, and NAICS 90, Government account for 57.9 percent, 16,026, of 2015 jobs, and 55.0 percent of 2014 gross regional product. Average Earnings (total compensation) for NAICS 31, Manufacturing, \$62,580, NAICS 42, Wholesale Trade, \$59,689, and NAICS 90, Government, \$47,760 are all above the area average, \$46,144, while average earnings for NAICS 62, Health Care and Social Assistance, \$38,379, is below.

Table Eight
Rural Counties, York County Target Study,
2015 Employment, 2015 Earnings & 2014 Gross Regional Product by Industry

NAICS	Description	2015 Employment		2015 Average	2014 Gross Regional Product	
		Number	Percent	Earnings \$	Level 1,000\$	Percent
11	Crop and Animal Production	1,400	5.1	40,720	363,466	14.4
21	Mining, Quarrying, and Oil and Gas Extraction	25	0.1	21,815	18,627	0.7
22	Utilities	23	0.1	110,696	11,148	0.4
23	Construction	1,292	4.7	48,186	125,998	5.0
31	Manufacturing	5,793	20.9	62,580	738,323	29.2
42	Wholesale Trade	1,624	5.9	59,689	220,890	8.7
44	Retail Trade	2,218	8.0	28,632	102,748	4.1
48	Transportation and Warehousing	1,389	5.0	58,363	138,054	5.5
51	Information	243	0.9	46,576	40,097	1.6
52	Finance and Insurance	844	3.0	56,641	123,652	4.9
53	Real Estate and Rental and Leasing	70	0.3	32,764	42,006	1.7
54	Professional, Scientific, and Technical Services	319	1.2	53,158	31,337	1.2
55	Management of Companies and Enterprises	45	0.2	66,767	4,281	0.2
56	Administrative and Support and Waste Management and Remediation Services	369	1.3	36,138	22,365	0.9
61	Educational Services	1,237	4.5	28,214	39,355	1.6
62	Health Care and Social Assistance	2,384	8.6	38,379	109,671	4.3
71	Arts, Entertainment, and Recreation	161	0.6	15,055	4,960	0.2
72	Accommodation and Food Services	1,091	3.9	12,231	23,334	0.9
81	Other Services (except Public Administration)	956	3.5	23,198	44,570	1.8
90	Government	6,225	22.5	47,760	324,924	12.8
	Total	27,709	100.0	46,144	2,529,807	100.0

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

As shown in Table Nine below, NAICS 31, Manufacturing, NAICS 42, Wholesale Trade, NAICS 62, Health Care and Social Assistance, and NAICS 90, Government account for 44.0 percent (92,757) of 2015 jobs and 46.9 percent of 2014 gross regional product in the Core Metro Counties. Average Earnings (total compensation) for NAICS 31, Manufacturing, \$62,711, NAICS 42, Wholesale Trade, \$63,043, NAICS 62, Health Care and Social Assistance, \$52,601, and NAICS 90, Government, \$61,248 are well above the Core Metro County average of \$50,390.

**Table Nine
Core Metro Counties, York County Target Study,
2015 Employment, 2015 Earnings & 2014 Gross Regional Product by Industry**

NAICS	Description	2015 Employment		2015 Average Earnings \$	2014 Gross Regional Product	
		Number	Percent		Level 1,000\$	Percent
11	Crop and Animal Production	834	0.4	39,502	115,622	0.7
21	Mining, Quarrying, and Oil and Gas Extraction	26	0.0	54,313	19,006	0.1
22	Utilities	179	0.1	105,417	102,321	0.6
23	Construction	9,940	4.7	55,527	904,470	5.4
31	Manufacturing	19,806	9.4	62,711	2,602,872	15.5
42	Wholesale Trade	5,134	2.4	63,043	809,775	4.8
44	Retail Trade	24,037	11.4	30,555	1,110,286	6.6
48	Transportation and Warehousing	11,987	5.7	65,888	1,117,236	6.7
51	Information	2,763	1.3	71,266	500,616	3.0
52	Finance and Insurance	12,191	5.8	65,321	1,929,574	11.5
53	Real Estate and Rental and Leasing	1,990	0.9	41,862	445,885	2.7
54	Professional, Scientific, and Technical Services	9,504	4.5	67,693	878,415	5.2
55	Management of Companies and Enterprises	3,110	1.5	79,016	276,819	1.7
56	Administrative and Support and Waste Management and Remediation Services	9,279	4.4	34,928	437,469	2.6
61	Educational Services	3,123	1.5	29,982	106,896	0.6
62	Health Care and Social Assistance	26,581	12.6	52,601	1,532,986	9.1
71	Arts, Entertainment, and Recreation	3,695	1.8	17,004	122,208	0.7
72	Accommodation and Food Services	16,918	8.0	17,259	427,345	2.5
81	Other Services (except Public Administration)	8,401	4.0	32,122	382,033	2.3
90	Government	41,236	19.6	61,248	2,941,182	17.5
	Total	210,732	100.0	50,390	16,763,016	100.0

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

As shown in Table Ten (next page), firms in NAICS 31, Manufacturing and NAICS 42, Wholesale Trade provide good compensation and make up significant portions of the study area economy. Firms in NAICS 62, Health Care and Social Assistance make up a large portions the area economies, provide good wages in York and the Core Metro Counties, but provide below average wages in the Rural Counties. It is highly likely businesses in these broad categories will be major sources of future growth. Recent trends suggest it is unlikely NAICS, 90 Government will be as strong a source of future job growth.

Table Ten
Distribution of 2015 Employment, 2015 Average Annual Earnings & Earnings as a Percent of U.S. Average
York County, Rural Counties & Metro Core Counties

NAICS	York			Rural			Metro Core		
	Percent 2015 Employment	Percent 2014 GRP	2015 Average Annual Earnings \$	Percent 2015 Employment	Percent 2014 GRP	2015 Average Annual Earnings \$	Percent 2015 Employment	Percent 2014 GRP	2015 Average Annual Earnings \$
11 Crop and Animal Production	5.4	10.6	49,414	5.1	14.4	40,720	0.4	0.7	39,502
21 Mining, Quarrying, and Oil and Gas Extraction	NA	0.4	NA	0.1	0.7	21,815	NA	0.1	54,313
22 Utilities	NA	0.4	NA	0.1	0.4	110,696	0.1	0.6	105,417
23 Construction	4.2	4.6	53,879	4.7	5.0	48,186	4.7	5.4	55,527
31 Manufacturing	10.1	17.9	62,501	20.9	29.2	62,580	9.4	15.5	62,711
42 Wholesale Trade	6.2	11.9	63,726	5.9	8.7	59,689	2.4	4.8	63,043
44 Retail Trade	10.8	6.3	28,061	8.0	4.1	28,632	11.4	6.6	30,555
48 Transportation and Warehousing	2.4	2.3	45,357	5.0	5.5	58,363	5.7	6.7	65,888
51 Information	1.0	1.4	44,416	0.9	1.6	46,576	1.3	3.0	71,266
52 Finance and Insurance	4.6	9.2	52,930	3.0	4.9	56,641	5.8	11.5	65,321
53 Real Estate and Rental and Leasing	0.2	1.4	33,056	0.3	1.7	32,764	0.9	2.7	41,862
54 Professional, Scientific, and Technical Services	2.6	2.8	58,903	1.2	1.2	53,158	4.5	5.2	67,693
55 Management of Companies and Enterprises	NA	NA	NA	0.2	0.2	66,767	1.5	1.7	79,016
56 Administrative and Support and Waste Management and Remediation Services	3.6	2.7	41,701	1.3	0.9	36,138	4.4	2.6	34,928
61 Educational Services	3.8	1.9	31,645	4.5	1.6	28,214	1.5	0.6	29,982
62 Health Care and Social Assistance	13.3	8.2	43,457	8.6	4.3	38,379	12.6	9.1	52,601
71 Arts, Entertainment, and Recreation	0.7	0.3	19,592	0.6	0.2	15,055	1.8	0.7	17,004
72 Accommodation and Food Services	9.8	3.3	16,321	3.9	0.9	12,231	8.0	2.5	17,259
81 Other Services (except Public Administration)	5.8	2.6	25,306	3.5	1.8	23,198	4.0	2.3	32,122
90 Government	15.4	11.9	51,867	22.5	12.8	47,760	19.6	17.5	61,248
Total	100.0	100.0	43,385	100.0	100.0	46,144	100.0	100.0	50,390

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Major Occupations and Wages

The composition of occupations, including associated skill levels, employed within a region is determined by the mix of existing industries. An analysis of average area compensation relative to national averages provides information on the relative skill levels and the attractiveness of an area for retention and growth of industries dependent upon specific abilities.

Tables Eleven through Thirteen on the following pages provide information on the number of employees, projected total change in employment between 2015 and 2021, and median hourly earnings for York County, the Rural Counties, and the Core Metro Counties. These tables also contain a comparison of median hourly earnings by occupation relative to an area's overall average by major occupational group. Table Fifteen on the following pages compares median pay per occupation to the median U.S. pay for each of the areas in the study.

As shown in Tables Eleven through Fourteen, Office and Administrative Support occupations is the largest occupational category when measured by employment in York County and the Core Metro Counties and the second largest in the Rural Counties. This is due to the prevalence of these occupations across virtually all industries. The low absolute and relative average wages for this occupation within the study area, suggest relatively low overall levels of productivity for this group.

Production is the largest occupational group by employment in the Rural Counties. While average Production occupation wages are higher than those of Office and Administrative Support occupations, they are lower than the median for all wages in the Rural Counties and the Core Metro Counties and only slightly higher than the median in York County. However, median wages of Production workers are greater than the national average in all three areas. This suggests a high level of productivity for production workers across the region.

Sales and Related Occupations and Food Preparation and Serving Related Occupations are the second and third largest categories in York County and the Rural Counties. Both of these occupations have low median wages that are similar to the Office and Administrative Support occupations.

Management Occupations, Business and Financial Operations Occupations, and Healthcare Practitioners and Technical Occupations are among the highest paid occupations that make up at least one percent of the jobs in all three of the study areas. In each case the median wage is less than 90.0 percent of the U.S. average.

Wage data and employment data does not initially indicate the presence of a strong core of well paid workers in any specific occupation.

Table Eleven
York County, 2016 Employment, 2015 Median Hourly Earnings and
2015–2021 Projected Employment Change and Total Job Openings
by Standard Occupational Category (SOC)

SOC	Occupation Category	2016 Employment		2015 Median Hourly Earnings		Projected Total Change	
				Hourly \$	Percent Area Average	2015-2021	
		Number	Percent			Employment	Job Openings
11-0000	Management Occupations	278	3.4	40.61	230.2	19	63
13-0000	Business and Financial Operations Occupations	246	3.0	27.89	158.1	20	53
15-0000	Computer and Mathematical Occupations	66	0.8	31.26	177.2	7	12
17-0000	Architecture and Engineering Occupations	82	1.0	36.58	207.4	4	19
19-0000	Life, Physical, and Social Science Occupations	96	1.2	31.03	175.9	6	29
21-0000	Community and Social Service Occupations	209	2.5	18.11	102.7	20	34
23-0000	Legal Occupations	20	0.2	23.58	133.7	1	NA
25-0000	Education, Training, and Library Occupations	385	4.6	20.75	117.6	26	81
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	65	0.8	15.76	89.3	4	18
29-0000	Healthcare Practitioners and Technical Occupations	401	4.8	29.12	165.1	47	115
31-0000	Healthcare Support Occupations	278	3.4	13.26	75.2	40	97
33-0000	Protective Service Occupations	227	2.7	19.99	113.3	13	51
35-0000	Food Preparation and Serving Related Occupations	847	10.2	10.68	60.5	73	240
37-0000	Building and Grounds Cleaning and Maintenance Occupations	254	3.1	11.25	63.8	20	62
39-0000	Personal Care and Service Occupations	223	2.7	10.22	57.9	28	42
41-0000	Sales and Related Occupations	866	10.5	15.15	85.9	50	200
43-0000	Office and Administrative Support Occupations	1,264	15.3	14.20	80.5	58	217
45-0000	Farming, Fishing, and Forestry Occupations	330	4.0	14.49	82.1	8	143
47-0000	Construction and Extraction Occupations	393	4.7	17.61	99.8	28	107
49-0000	Installation, Maintenance, and Repair Occupations	392	4.7	19.65	111.4	26	73
51-0000	Production Occupations	623	7.5	17.67	100.2	-2	124
53-0000	Transportation and Material Moving Occupations	689	8.3	14.63	82.9	43	154
55-0000	Military occupations	47	0.6	20.78	117.8	0	NA
	Total	8,280	100.0	17.64	100.0	540	1,944

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twelve
Rural Counties, York County Target Study, 2016 Employment, 2015 Median Hourly Earnings and
2015–2021 Projected Employment Change and Total Job Openings
by Standard Occupational Category (SOC)**

SOC	Occupation Category	2016 Employment		2015 Median Hourly Earnings		Projected Total Change	
				Hourly \$	Percent Area Average	2015-2021	
		Number	Percent			Employment	Job Openings
11-0000	Management Occupations	1,017	3.6	36.68	207.7	70	274
13-0000	Business and Financial Operations Occupations	733	2.6	26.14	148.0	60	191
15-0000	Computer and Mathematical Occupations	249	0.9	26.35	149.2	30	65
17-0000	Architecture and Engineering Occupations	202	0.7	31.26	177.0	9	62
19-0000	Life, Physical, and Social Science Occupations	228	0.8	25.83	146.3	17	67
21-0000	Community and Social Service Occupations	493	1.7	16.78	95.0	45	118
23-0000	Legal Occupations	71	0.3	25.19	142.6	4	15
25-0000	Education, Training, and Library Occupations	2,335	8.3	21.23	120.2	151	549
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	244	0.9	15.44	87.4	14	71
29-0000	Healthcare Practitioners and Technical Occupations	1,340	4.7	28.85	163.4	159	335
31-0000	Healthcare Support Occupations	773	2.7	11.99	67.9	116	176
33-0000	Protective Service Occupations	401	1.4	18.64	105.5	23	103
35-0000	Food Preparation and Serving Related Occupations	1,639	5.8	9.44	53.5	143	438
37-0000	Building and Grounds Cleaning and Maintenance Occupations	928	3.3	11.28	63.9	73	256
39-0000	Personal Care and Service Occupations	542	1.9	10.43	59.1	67	177
41-0000	Sales and Related Occupations	2,132	7.6	14.69	83.2	122	672
43-0000	Office and Administrative Support Occupations	3,928	13.9	13.86	78.5	177	814
45-0000	Farming, Fishing, and Forestry Occupations	1,066	3.8	16.06	90.9	29	276
47-0000	Construction and Extraction Occupations	1,301	4.6	16.43	93.0	91	424
49-0000	Installation, Maintenance, and Repair Occupations	1,393	4.9	19.16	108.5	87	432
51-0000	Production Occupations	4,155	14.7	17.12	96.9	-14	1,056
53-0000	Transportation and Material Moving Occupations	2,824	10.0	16.37	92.7	173	772
55-0000	Military occupations	232	0.8	20.31	115.0	0	33
	Total	28,225	100.0	17.66	100.0	1,647	7,377

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Thirteen
Metro Counties, York County Target Study, 2016 Employment,
2015 Median Hourly Earnings and 2015-2021 Projected Employment Change &
Total Job Openings by Standard Occupational Category (SOC)**

SOC	Occupation Category	2016 Employment		2015 Median Hourly Earnings		Projected Total Change 2015-2021	
		Number	Percent	Hourly \$	Percent	Employment	Job Openings
					Area Average		
11-0000	Management Occupations	8,107	3.8	42.14	220.6	634	1,818
13-0000	Business and Financial Operations Occupations	11,672	5.5	28.20	147.6	935	2,737
15-0000	Computer and Mathematical Occupations	6,470	3.0	28.30	148.2	839	1,560
17-0000	Architecture and Engineering Occupations	2,939	1.4	31.03	162.5	171	682
19-0000	Life, Physical, and Social Science Occupations	2,141	1.0	24.21	126.8	138	577
21-0000	Community and Social Service Occupations	4,952	2.3	17.35	90.8	356	1,549
23-0000	Legal Occupations	1,275	0.6	33.41	174.9	30	198
25-0000	Education, Training, and Library Occupations	12,592	5.9	23.44	122.7	223	2,927
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	2,926	1.4	18.63	97.5	155	726
29-0000	Healthcare Practitioners and Technical Occupations	11,622	5.4	31.53	165.1	974	2,461
31-0000	Healthcare Support Occupations	5,251	2.5	13.45	70.4	618	1,446
33-0000	Protective Service Occupations	3,255	1.5	20.35	106.5	83	717
35-0000	Food Preparation and Serving Related Occupations	19,014	8.9	9.91	51.9	2,496	6,172
37-0000	Building and Grounds Cleaning and Maintenance Occupations	6,789	3.2	10.82	56.6	447	2,076
39-0000	Personal Care and Service Occupations	6,068	2.8	11.05	57.9	682	2,861
41-0000	Sales and Related Occupations	20,860	9.8	14.01	73.4	1,373	5,552
43-0000	Office and Administrative Support Occupations	36,710	17.2	14.80	77.5	1,920	7,280
45-0000	Farming, Fishing, and Forestry Occupations	661	0.3	18.05	94.5	59	383
47-0000	Construction and Extraction Occupations	8,763	4.1	18.44	96.5	525	2,122
49-0000	Installation, Maintenance, and Repair Occupations	7,408	3.5	21.21	111.0	599	1,912
51-0000	Production Occupations	16,063	7.5	16.50	86.4	1,148	4,710
53-0000	Transportation and Material Moving Occupations	16,649	7.8	18.83	98.6	1,883	3,995
55-0000	Military occupations	1,342	0.6	20.85	109.2	-51	241
	Total	213,527	100.0	19.10	100.0	16,238	54,701

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Fourteen
Employment Distribution, Median Hourly Earnings, and Median Hourly Earnings as a Percent of U.S.
by Standard Occupational Category (SOC), 2016, York County, Rural Counties, and Core Metro Counties

SOC	Occupation Category	York County			Rural Counties			Core Metro Counties		
		2015 Median Hourly Earnings			2015 Median Hourly Earnings			2015 Median Hourly Earnings		
		2016 Percent Jobs	\$	% US Median	2016 Percent Jobs	\$	% US Median	2016 Percent Jobs	\$	% US Median
11-0000	Management Occupations	3.4	40.61	83.7	3.6	36.68	75.6	3.8	42.14	86.9
13-0000	Business and Financial Operations Occupations	3.0	27.89	87.5	2.6	26.14	82.0	5.5	28.20	88.5
15-0000	Computer and Mathematical Occupations	0.8	31.26	80.5	0.9	26.35	67.9	3.0	28.30	72.9
17-0000	Architecture and Engineering Occupations	1.0	36.58	96.3	0.7	31.26	82.3	1.4	31.03	81.7
19-0000	Life, Physical, and Social Science Occupations	1.2	31.03	97.5	0.8	25.83	81.2	1.0	24.21	76.1
21-0000	Community and Social Service Occupations	2.5	18.11	87.3	1.7	16.78	80.9	2.3	17.35	83.6
23-0000	Legal Occupations	0.2	23.58	53.4	0.3	25.19	57.1	0.6	33.41	75.7
25-0000	Education, Training, and Library Occupations	4.6	20.75	88.0	8.3	21.23	90.0	5.9	23.44	99.4
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	0.8	15.76	67.4	0.9	15.44	66.1	1.4	18.63	79.7
29-0000	Healthcare Practitioners and Technical Occupations	4.8	29.12	81.6	4.7	28.85	80.9	5.4	31.53	88.4
31-0000	Healthcare Support Occupations	3.4	13.26	98.5	2.7	11.99	89.1	2.5	13.45	99.9
33-0000	Protective Service Occupations	2.7	19.99	96.6	1.4	18.64	90.0	1.5	20.35	98.3
35-0000	Food Preparation and Serving Related Occupations	10.2	10.68	106.2	5.8	9.44	93.9	8.9	9.91	98.6
37-0000	Building and Grounds Cleaning and Maintenance Occupations	3.1	11.25	94.7	3.3	11.28	95.0	3.2	10.82	91.1
39-0000	Personal Care and Service Occupations	2.7	10.22	90.7	1.9	10.43	92.6	2.8	11.05	98.1
41-0000	Sales and Related Occupations	10.5	15.15	94.3	7.6	14.69	91.5	9.8	14.01	87.2
43-0000	Office and Administrative Support Occupations	15.3	14.20	86.7	13.9	13.86	84.6	17.2	14.80	90.4
45-0000	Farming, Fishing, and Forestry Occupations	4.0	14.49	122.3	3.8	16.06	135.5	0.3	18.05	152.3
47-0000	Construction and Extraction Occupations	4.7	17.61	81.2	4.6	16.43	75.8	4.1	18.44	85.1
49-0000	Installation, Maintenance, and Repair Occupations	4.7	19.65	93.4	4.9	19.16	91.0	3.5	21.21	100.8
51-0000	Production Occupations	7.5	17.67	108.0	14.7	17.12	104.7	7.5	16.50	100.9
53-0000	Transportation and Material Moving Occupations	8.3	14.63	94.2	10.0	16.37	105.4	7.8	18.83	121.2
55-0000	Military occupations	0.6	20.78	122.8	0.8	20.31	120.0	0.6	20.85	123.2
	Total	100.0	17.64	83.5	100.0	17.66	83.6	100.0	19.10	90.4

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Analysis of Potential Targets

As noted in previous sections of this study, the broad industry categories Manufacturing, Wholesale Trade, and Health Care and Social Assistance make up a large portion of the current York County, Rural Counties, and Core Metro Counties economies when measured by employment and contribution to gross regional product. Additionally these industries pay from average to well above average wages.

Information in this section provides a more detailed analysis of the industries and sub-industries within the study area. This information is used to assess the suitability of individual industries as potential targets for retention, expansion, and recruitment efforts.

Excluded from this analysis are industries whose growth is highly dependent on local population growth. These include Retail Trade; Construction; Government; and Real Estate and Rental and Leasing. Industries currently employing less than 2.0 percent of the workforce are also excluded as information on these industries is subject to large errors in estimation. Additionally, only industries with average annual total earnings (wages and benefits) of at least \$44,000, just above the average for York County, are included.

The services provided by Healthcare and Social Assistance establishments in rural areas are often designed to serve local markets. This local market focus typically excludes them from consideration as key drivers of area economies. However, the substantial, presence of this industry in York County justifies the inclusion of this sector for further analysis in the study.

Location Quotient (LQ) Analysis

In this section, LQ analysis is used to identify study area industries that have recently and/or are expected to in the future perform better than the national average. Superior performance by area industries indicates the presence of substantial competitive advantages or regional strengths. These advantages and/or strengths, such as access to skilled labor or access or specialized resources, are critical to an industry and provide a rationale for a region's expected future growth.

LQs indicate whether the percentage of total employment¹ by an area industry is greater than the national average (LQ>1), is equal to the national average (LQ=1) or is less than the national average (LQ<1). Industries with a LQ>1 typically indicate the presence of a comparative advantage, such as a large source of skilled labor or access to specialized transportation linkages.

¹ In addition to employment, location quotients can be calculated for other factors, such as total sales and taxes. For this report LQs are reported for employment only.

Industries with a LQ>1, experiencing local employment growth, with expected future growth and paying good wages (at least \$44,000 per year) are key to the future growth of a region. Industries with low LQs, but increasing levels of employment and good wages may have the potential to become key drivers of the economy. Industries with a LQ>1 and stable to declining local employment are considered to be mature or declining industries. Mature or declining industries may command significant retention efforts when they employ large numbers of area workers. Other combinations of LQs and growth are typically not of interest and are not considered for further analysis in this study. The criteria used to categorize industries based on their likely potential to drive future growth are summarized in Table Fifteen below.

**Table Fifteen
Initial Classification of Industries by Potential to Drive Local Growth**

Category	LQ	Recent Growth	Projected Growth	Compensation
Key to Future Growth	1+	+	+	>\$44,000
Potential to Drive Future Growth	<1	+	+/-	>\$44,000
Mature or Declining	1+	+/-	-/+	>\$44,000
Not Further Considered	<1	+/-	-/+	> or < \$44,000

Tables Sixteen through Eighteen on the following pages contain information on recent, current, and projected future employment and LQs plus current average total earnings by major industry sector for York County, the other Rural Counties, and the Core Metro Counties. Similarities in these data for York County and the other Rural Counties justify combining them into a new, single category of York Plus Rural Counties for the remainder of this study.

Table Twenty contains information on current LQs, the expected trend in LQ values from 2015 to 2021, the distribution of jobs by industry, and whether or not a broad industry will be considered for further study for York and the Rural Counties and the Core Metro County areas. Industries are selected for further study if they are classified as Key to Future Growth or as having the Potential to Drive Future Growth using the criteria in Table Sixteen above. The four major industries initially selected for further analysis as shown in Table Twenty are Manufacturing; Wholesale Trade; Transportation and Warehousing; plus Finance and Insurance.

Two major industries, Professional, Scientific, and Technical Services plus Health Care and Social Assistance meet the criteria for a potential study target in the Core Metro Counties but not in York Plus Rural Counties. Both of these are also retained for further study.

Table Sixteen
York County, Employment, Employment Percent Change,
Location Quotients, and Average Annual Earnings, 2009–2021, Selected Years

NAICS	Description	Employment				% Change 2015- 2021	LQ			Average Earnings 2015 \$
		2009	2015	2021	2009		2015	2021		
11	Crop and Animal Production	190	439	563	28.2	2.64	5.63	7.09	49,414	
21	Mining, Quarrying, and Oil and Gas Extraction	10	NA	NA	0.1	0.28	0.02	0.01	NA	
22	Utilities	<10	NA	NA	0.1	0.05	0.24	0.18	NA	
23	Construction	290	340	417	22.6	0.81	0.91	1.04	53,879	
31	Manufacturing	841	827	816	-1.3	1.25	1.20	1.24	62,501	
42	Wholesale Trade	440	504	514	2.0	1.39	1.53	1.50	63,726	
44	Retail Trade	972	883	901	2.0	1.17	1.01	0.99	28,061	
48	Transportation and Warehousing	119	198	180	-9.1	0.50	0.73	0.63	45,357	
51	Information	88	80	69	-13.8	0.55	0.52	0.45	44,416	
52	Finance and Insurance	357	375	399	6.4	1.10	1.15	1.18	52,930	
53	Real Estate and Rental and Leasing	41	18	20	11.1	0.35	0.15	0.16	33,056	
54	Professional, Scientific, and Technical Services	207	209	233	11.5	0.48	0.43	0.43	58,903	
55	Management of Companies and Enterprises	16	NA	NA	0.1	0.15	0.05	0.02	NA	
56	Administrative and Support and Waste Management and Remediation Services	184	295	357	21.0	0.45	0.60	0.66	41,701	
61	Educational Services	230	306	317	3.6	1.23	1.48	1.40	31,645	
62	Health Care and Social Assistance	1,186	1,088	1,247	14.6	1.29	1.05	1.06	43,457	
71	Arts, Entertainment, and Recreation	60	55	50	-9.1	0.54	0.45	0.38	19,592	
72	Accommodation and Food Services	787	800	843	5.4	1.24	1.11	1.08	16,321	
81	Other Services (except Public Administration)	456	471	384	-18.5	1.36	1.45	1.15	25,306	
90	Government	1,224	1,257	1,295	3.0	0.87	0.93	0.94	51,867	
	Total	7,700	8,158	8,616	5.6	NA	NA	NA	43,385	

NA: Not Available.

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Seventeen
Rural Counties, York County Target Study,
Employment, Employment Percent Change,
Location Quotients, and Average Annual Earnings, 2009-2021, Selected Years

NAICS	Description	Employment				% Change 2015-2021	LQ			Average Earnings 2015 \$
		2009	2015	2021			2009	2015	2021	
11	Crop and Animal Production	1,209	1,400	1,466	4.7	4.99	5.29	5.22	40,720	
21	Mining, Quarrying, and Oil and Gas Extraction	32	25	28	12.0	0.26	0.18	0.19	21,815	
22	Utilities	25	23	17	-26.1	0.24	0.22	0.15	110,696	
23	Construction	1,017	1,292	1,655	28.1	0.85	1.02	1.17	48,186	
31	Manufacturing	5,210	5,793	6,335	9.4	2.30	2.48	2.72	62,580	
42	Wholesale Trade	1,269	1,624	1,965	21.0	1.19	1.46	1.63	59,689	
44	Retail Trade	2,313	2,218	2,407	8.5	0.83	0.75	0.75	28,632	
48	Transportation and Warehousing	1,254	1,389	1,495	7.6	1.55	1.51	1.49	58,363	
51	Information	216	243	297	22.2	0.40	0.46	0.55	46,576	
52	Finance and Insurance	871	844	846	0.2	0.80	0.76	0.70	56,641	
53	Real Estate and Rental and Leasing	69	70	83	18.6	0.18	0.17	0.19	32,764	
54	Professional, Scientific, and Technical Services	324	319	369	15.7	0.22	0.19	0.19	53,158	
55	Management of Companies and Enterprises	67	45	59	31.1	0.19	0.11	0.13	66,767	
56	Administrative and Support and Waste Management and Remediation Services	445	369	485	31.4	0.32	0.22	0.26	36,138	
61	Educational Services	1,273	1,237	1,346	8.8	2.02	1.76	1.68	28,214	
62	Health Care and Social Assistance	2,122	2,384	2,675	12.2	0.69	0.68	0.64	38,379	
71	Arts, Entertainment, and Recreation	192	161	160	-0.6	0.52	0.39	0.34	15,055	
72	Accommodation and Food Services	1,102	1,091	1,075	-1.5	0.52	0.44	0.39	12,231	
81	Other Services (except Public Administration)	909	956	1,060	10.9	0.80	0.87	0.90	23,198	
90	Government	6,012	6,225	6,617	6.3	1.27	1.36	1.37	47,760	
	Total	25,931	27,709	30,438	9.8	NA	NA	NA	46,144	

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Eighteen
Core Metro Counties, York County Target Study,
Employment, Employment Percent Change,
Location Quotients, and Average Annual Earnings, 2009-2021, Selected Years**

NAICS	Description	Employment				LQ			Average Earnings 2015 \$
		2009	2015	2021	% Change 2015-2021	2009	2015	2021	
		11	Crop and Animal Production	694	834	941	0.1	0.38	
21	Mining, Quarrying, and Oil and Gas Extraction	28	26	29	0.1	0.03	0.02	0.03	54,313
22	Utilities	269	179	163	-0.1	0.33	0.22	0.20	105,417
23	Construction	8,945	9,940	11,277	0.1	0.98	1.04	1.09	55,527
31	Manufacturing	19,159	19,806	20,492	0.0	1.11	1.12	1.20	62,711
42	Wholesale Trade	5,270	5,134	5,030	0.0	0.65	0.61	0.57	63,043
44	Retail Trade	22,347	24,037	24,427	0.0	1.05	1.06	1.04	30,555
48	Transportation and Warehousing	11,020	11,987	13,012	0.1	1.80	1.71	1.77	65,888
51	Information	2,568	2,763	2,791	0.0	0.63	0.69	0.70	71,266
52	Finance and Insurance	11,531	12,191	13,068	0.1	1.39	1.45	1.49	65,321
53	Real Estate and Rental and Leasing	1,882	1,990	2,052	0.0	0.64	0.65	0.64	41,862
54	Professional, Scientific, and Technical Services	8,672	9,504	10,157	0.1	0.79	0.76	0.73	67,693
55	Management of Companies and Enterprises	3,465	3,110	3,208	0.0	1.28	0.98	0.94	79,016
56	Administrative and Support and Waste Management and Remediation Services	7,579	9,279	10,281	0.1	0.73	0.73	0.74	34,928
61	Educational Services	2,669	3,123	3,332	0.1	0.56	0.58	0.57	29,982
62	Health Care and Social Assistance	23,540	26,581	29,647	0.1	1.00	0.99	0.97	52,601
71	Arts, Entertainment, and Recreation	2,902	3,695	3,744	0.0	1.04	1.18	1.11	17,004
72	Accommodation and Food Services	15,124	16,918	18,296	0.1	0.94	0.91	0.91	17,259
81	Other Services (except Public Administration)	7,894	8,401	8,137	0.0	0.92	1.00	0.94	32,122
90	Government	41,155	41,236	42,461	0.0	1.15	1.18	1.20	61,248
	Total	196,714	210,732	222,545	0.1	NA	NA	NA	50,390

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Nineteen
Potential Target Indicators, Location Quotients, Jobs and Income
Combined York and Rural Counties & Core Metro Counties

NAICS	Combined York and Rural Counties				Core Metro Counties			
	2015 LQ & Projected Trend	2015 Percent Total	2015 Total Income	Potential Target	2015 LQ & Projected Trend	2015 Percent Total	2015 Total Income	Potential Target
11 Crop and Animal Production	5.37 +	5.1	42,873	No	0.41 +	0.40	39,502	No
21 Mining, Quarrying, and Oil and Gas Extraction	0.14 +	0.1	21,365	No	0.02 +	0.00	54,313	No
22 Utilities	0.22 o	0.1	101,763	Yes	0.22 o	0.10	105,417	No
23 Construction	1.00 +	4.5	49,353	No	1.04 +	4.70	55,527	No
31 Manufacturing	2.19 +	18.5	62,571	Yes	1.12 +	9.40	62,711	Yes
42 Wholesale Trade	1.47 +	5.9	60,614	Yes	0.61 o	2.40	63,043	Yes
44 Retail Trade	0.81 o	8.6	28,470	No	1.06 o	11.40	30,555	No
48 Transportation and Warehousing	1.33 o	4.4	56,764	Yes	1.71 +	5.70	65,888	Yes
51 Information	0.48 +	0.9	46,061	No	0.69 +	1.30	71,266	No
52 Finance and Insurance	0.85 o	3.4	55,499	Yes	1.45 +	5.80	65,321	Yes
53 Real Estate and Rental and Leasing	0.17 +	0.2	32,823	No	0.65 o	0.90	41,862	No
54 Professional, Scientific, and Technical Services	0.25 o	1.5	55,446	No	0.76 o	4.50	67,693	Yes
55 Management of Companies and Enterprises	0.09 +	0.1	62,928	No	0.98 o	1.50	79,016	No
56 Administrative and Support and Waste Management and Remediation Services	0.31 +	1.9	38,579	No	0.73 +	4.40	34,928	No
61 Educational Services	1.7 o	4.3	28,876	No	0.58 o	1.50	29,982	No
62 Health Care and Social Assistance	0.76 o	9.7	39,971	No	0.99 o	12.60	52,601	Yes
71 Arts, Entertainment, and Recreation	0.41 o	0.6	16,218	No	1.18 o	1.80	17,004	No
72 Accommodation and Food Services	0.59 o	5.3	13,973	No	0.91 +	8.00	17,259	No
81 Other Services (except Public Administration)	1 o	4.0	23,869	No	1 o	4.00	32,122	No
90 Government	1.26 +	20.9	48,447	No	1.18 +	19.60	61,248	No

* Future Trend Symbols: + increasing; o neutral; - decreasing

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

A more detailed analysis of the sub-industries, i.e., 3-Digit NAICS Code industries, within the six major industries selected for study, indicates the need to reorganize some of them into new groups of eight categories. Table Twenty shows the eight industry categories used in the following sections of this study. Manufacturing is broken out into three sectors: a.) NAICS 31, Manufacturing Crop and Animal Related Manufacturing; b.) NAICS 32, Metal, Metal Products and Machinery Manufacturing; and c) NAICS 33, All Other Manufacturing. NAICS 621, 622, and 623 form a new category: Health Care. The remaining broad industry categories, NAICS 42, Wholesale Trade; NAICS 48, Transportation and Warehousing; and NAICS 54, Professional, Scientific, and Technical Services are the same as the major industries in previous sections of the study.

Table Twenty
Jobs and Percent Area Jobs by Target Industry Group
York and Rural Counties & Core Metro Counties

Target Industry Group	York and Rural Counties		Core Metro	
	Total Jobs	Percent Area Jobs	Total Jobs	Percent Area Jobs
Manufacturing Crop and Animal Related Metal, Metal Products and Machinery Manufacturing	3,288	9.2	5,557	2.4
All Other Manufacturing	995	2.8	4,736	2.1
Wholesale Trade	2,280	6.4	9,499	4.1
Transportation and Warehousing	2,114	5.9	5,128	2.2
Finance and Insurance	1,562	4.4	11,977	5.2
Professional, Scientific, and Technical Services	1,209	3.4	12,191	5.3
Health Care	529	1.5	9,504	4.1
Total	3,035	8.5	21,147	9.2
	15,012	42.1	79,739	34.6

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

As shown in Table Twenty above, the eight industry categories account for 42.1 percent of current employment in York and the Rural Counties and 34.6 percent in the Core Metro Counties. Manufacturing Crop and Animal Related is the largest industry category by employment in York and Rural Counties while Health Care is the largest in the Core Metro Counties. Health Care, All Other Manufacturing, and Wholesale trade are the second, third, and fourth largest employers in York and Rural Counties. Finance and Insurance; Transportation and Warehousing; and Professional, Scientific, and Technical Services are the second, third, and fourth largest employers in the Core Metro Counties.

Shift Share Analysis

Further analysis and refinement of the study area industries is accomplished using shift share analysis. Shift share analysis decomposes actual or projected changes in a local industry's employment into three components. These are the:

- National effect:** the local industry's starting employment multiplied by the percent change in national average employment for all industries—this shows the change in local employment attributable to the change in economy-wide employment;
- Industry effect:** the local industry's starting employment multiplied by the percent change in national employment for the industry minus the national effect—this shows the change in local employment attributable to an industry's employment trends after adjusting for national employment trends; and
- Competitive effect:** the difference between a local industry's ending and starting employment minus the national effect and the industry effect—this is an indication of the change in local employment attributable to an area's relative advantage or competitiveness.

The following is an example of a shift share decomposition:

1. Local Industry A grows by 10.0 percent from 1,000 to 1,100.
2. The average of all industry employment change in the U.S. is a 3.0 percent increase; the national effect is 30 or 1,000 times .03.
3. Average U.S. growth for Industry A is 5.0 percent.
4. The industry effect is .05 (5.0 percent) times 1,000 minus the national effect of 30; this is 50 minus 30 and the industry effect equals 20.
5. The competitive effect is 100 minus 30, the national effect, minus 20, the industry effect, and is equal to 50 or 5.0 percent. The industry has grown twice as fast as the average of similar industries across the U.S.

If a local industry's employment changes by the same percentage as the U.S. average for that industry, 5.0 percent in the above example, the competitive effect is zero. The change in employment for a U.S. industry is also referred to as the **expected effect** for a local industry.

If the competitive effect is very strong, a local industry can grow when the national and industry effects are both negative. Likewise, if a national industry is experiencing strong growth, the expected effect can be positive when the national effect is negative. Industries with positive industry and local competitive shift share effects are either key drivers or are likely to become key drivers of the local economy.

The criteria used to evaluate 4-digit NAICS industries within the seven broad industry categories in Table Twenty and the categories assigned are shown in Table Twenty-One. Industries are selected as Key to

Future Growth (K) if they have an LQ greater than one, are projected to have both a positive competitive effect and a positive expected growth effect (industry effect plus national effect) and current annual earnings greater than \$44,000. Potential to Drive Future Growth (P) industries are projected to have a positive competitive effect, positive expected growth (Industry plus national effect), and current annual earnings greater than \$44,000, but have an LQ less than one. Mature (M), possibly declining industries, have an LQ greater than one and a negative expected growth effect.

Table Twenty-One
Shift Share Classification of Industries by Potential to Drive Local Growth

Shift Share Analysis Category	LQ	Projected Change LQ	Projected Competitive Effect	Expected Growth Effect (Projected Industry Effect + National Effect)	Average Earnings >\$44,000
(K) Key to Future Growth	>1	+/-	+	+	Yes
(P) Potential to Drive Future Growth	.1-1.0	+/-	+/-	+	Yes
(M) Mature or Declining	>1	+/-	+/-	-	Yes
(X) Not Further Considered	>.01	+/-	+/-	+/-	Yes/No

Table Twenty-Two, Parts A through N on this and the following pages contain the projected 2015 through 2021 national effects, industry effects, expected change effects, and competitive effects; the 2015 LQ and projected 2021 LQ; and the shift share target category for 4-digit NAICS industries in each of the two study areas for each of the six target industry categories in Table Twenty-One.

Table Twenty-Two, Part A
York Plus Rural Counties, Manufacturing Crop and Animal Related

NAICS	Description	2015 - 2021		2015 - 2021		LQ 2015	LQ 2021	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021	Competitive Effect 2015 - 2021			
3111	Animal Food Manufacturing	62	-28	34	80	65.25	69.53	K
3112	Grain and Oilseed Milling	9	-12	-3	-31	9.24	6.92	M
3116	Animal Slaughtering and Processing	144	-123	21	229	17.42	18.97	K
3211	Sawmills and Wood Preservation	2	-2	0	-5	1.39	1.14	M
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	3	-4	-1	25	4.77	7.54	X

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Two, Part B
Core Metro Counties Manufacturing Crop and Animal Related**

NAICS	Description	2015 - 2021		2015 - 2021		LQ 2015	LQ 2021	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021	Competitive Effect 2015 - 2021			
3111	Animal Food Manufacturing	11	-5	6	-34	1.93	1.54	M
3112	Grain and Oilseed Milling	25	-32	-7	-53	4.21	3.64	M
3116	Animal Slaughtering and Processing	298	-255	43	395	6.12	6.76	K
3121	Beverage Manufacturing	15	11	26	48	0.72	0.87	P

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Two, Part C
York Plus Rural Counties, Metal, Metal Products and Machinery Manufacturing**

NAICS	Description	2015 - 2021		2015 - 2021		LQ 2015	LQ 2021	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021	Competitive Effect 2015 - 2021			
3311	Iron and Steel Mills and Ferroalloy Manufacturing	3	-5	-2	9	1.89	2.28	X
3323	Architectural and Structural Metals Manufacturing	22	-20	2	10	3.56	3.61	K
3326	Spring and Wire Product Manufacturing	1	-2	-1	4	0.96	1.37	X
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	8	-4	4	3	1.33	1.33	K
3329	Other Fabricated Metal Product Manufacturing	1	-1	0	0	0.20	0.20	X
3331	Agriculture, Construction, and Mining Machinery Manufacturing	22	-28	-6	-16	5.48	5.10	M
3339	Other General Purpose Machinery Manufacturing	9	-9	0	5	2.08	2.11	X

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Two, Part D
Core Metro Counties Metal, Metal Products and Machinery Manufacturing**

NAICS	Description	2015 - 2021	2015 - 2021	2015 - 2021	Competitive Effect	LQ	LQ	Target
		National Effect	Industry Effect	Expected Change		2015 - 2021	2015	
3315	Foundries	9	-24	-15	1	0.72	0.74	X
3323	Architectural and Structural Metals Manufacturing	77	-71	6	34	2.11	2.20	K
3324	Boiler, Tank, and Shipping Container Manufacturing	1	-1	0	-5	0.15	0.12	X
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt	32	-17	15	10	0.87	0.90	P
3328	Coating, Engraving, Heat Treating, and Allied Activities	35	-38	-3	32	2.51	2.70	X
3329	Other Fabricated Metal Product Manufacturing	60	-58	2	221	2.19	2.78	K
3331	Agriculture, Construction, and Mining Machinery Manufacturing	81	-103	-22	29	3.42	3.55	X
3333	Commercial and Service Industry Machinery Manufacturing	12	-28	-16	-9	1.33	1.27	M
3335	Metalworking Machinery Manufacturing	16	-27	-11	-22	0.87	0.80	X

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Two, Part E
York Plus Rural Counties, All Other Manufacturing**

NAICS	Description	2015 - 2021	2015 - 2021	2015 - 2021	Competitive Effect	LQ	LQ	Target
		National Effect	Industry Effect	Expected Change		2015 - 2021	2015	
3219	Other Wood Product Manufacturing	21	-36	-15	-5	5.62	5.43	M
3222	Converted Paper Product Manufacturing	1	-3	-2	-1	0.29	0.25	X
3251	Basic Chemical Manufacturing	12	-13	-1	18	4.84	5.25	X
3261	Plastics Product Manufacturing	4	-5	-1	3	0.42	0.44	X
3273	Cement and Concrete Product Manufacturing	5	-6	-1	-1	1.65	1.60	M
3344	Semiconductor and Other Electronic Component Manufacturing	2	-4	-2	18	0.32	0.52	X
3362	Motor Vehicle Body and Trailer Manufacturing	24	-19	5	68	9.63	11.26	K
3363	Motor Vehicle Parts Manufacturing	65	-69	-4	163	6.80	7.84	X
3364	Aerospace Product and Parts Manufacturing	14	-12	2	0	1.69	1.65	M
3391	Medical Equipment and Supplies Manufacturing	2	0	2	6	0.29	0.37	P

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Two, Part F Core Metro Counties All Other Manufacturing

NAICS	Description	2015 - 2021	2015 - 2021	2015 - 2021	Competitive Effect 2015 - 2021	LQ	LQ	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021		2015	2021	
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	8	-17	-9	80	1.13	1.96	X
3219	Other Wood Product Manufacturing	18	-31	-13	-32	0.82	0.72	X
3222	Converted Paper Product Manufacturing	14	-26	-12	42	0.50	0.63	X
3251	Basic Chemical Manufacturing	10	-11	-1	56	0.69	0.97	X
3254	Pharmaceutical and Medicine Manufacturing	83	-35	48	-24	2.96	2.94	M
3255	Paint, Coating, and Adhesive Manufacturing	6	-8	-2	2	1.01	1.05	X
3261	Plastics Product Manufacturing	45	-58	-13	-39	0.80	0.76	X
3262	Rubber Product Manufacturing	38	-74	-36	104	2.88	3.49	X
3271	Clay Product and Refractory Manufacturing	3	-9	-6	-4	0.74	0.66	X
3272	Glass and Glass Product Manufacturing	1	-2	-1	6	0.13	0.18	X
3273	Cement and Concrete Product Manufacturing	24	-27	-3	1	1.32	1.34	X
3279	Other Nonmetallic Mineral Product Manufacturing	2	0	2	17	0.33	0.48	P
3342	Communications Equipment Manufacturing	14	-52	-38	18	1.58	1.78	X
3343	Audio and Video Equipment Manufacturing	2	-9	-7	8	1.20	1.56	X
3344	Semiconductor and Other Electronic Component Manufacturing	83	-148	-65	425	2.27	3.15	X
3345	Navigational, Measuring, Electromedical, and Control	60	-87	-27	-8	1.49	1.50	X
3353	Electrical Equipment Manufacturing	18	-23	-5	-186	1.22	0.31	M
3359	Other Electrical Equipment and Component Manufacturing	24	-26	-2	-3	1.85	1.86	X
3362	Motor Vehicle Body and Trailer Manufacturing	11	-9	2	93	0.77	1.21	P
3363	Motor Vehicle Parts Manufacturing	43	-45	-2	252	0.76	1.08	X
3365	Railroad Rolling Stock Manufacturing	12	-3	9	-12	3.92	3.69	M
3369	Other Transportation Equipment Manufacturing	71	-121	-50	-158	21.31	18.07	M
3391	Medical Equipment and Supplies Manufacturing	8	-2	6	-8	0.27	0.26	X
3399	Other Miscellaneous Manufacturing	18	-39	-21	14	0.64	0.69	X

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Two, Part G
York Plus Rural Counties, Wholesale Trade

NAICS	Description	2015 - 2021	2015 - 2021	2015 - 2021	Competitive	LQ	LQ	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021	Effect 2015 - 2021	2015	2021	
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	4	-1	3	-5	0.68	0.61	X
4233	Lumber and Other Construction Materials Merchant Wholesalers	1	-1	0	12	0.40	0.61	X
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	3	-3	0	9	0.52	0.62	X
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	42	-28	14	41	3.66	3.82	K
4239	Miscellaneous Durable Goods Merchant Wholesalers	2	1	3	3	0.37	0.41	P
4245	Farm Product Raw Material Merchant Wholesalers	54	-18	36	88	42.27	46.02	K
4247	Petroleum and Petroleum Products Merchant Wholesalers	4	-3	1	2	2.10	2.19	K
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	34	-39	-5	142	6.12	7.76	X
4251	Wholesale Electronic Markets and Agents and Brokers	3	3	6	-8	0.19	0.15	X

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Two, Part H
Core Metro Counties Wholesale Trade**

NAICS	Description	2015 - 2021		2015 - 2021		LQ 2015	LQ 2021	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021	Competitive Effect 2015 - 2021			
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	43	-9	34	10	1.31	1.35	K
4232	Furniture and Home Furnishing Merchant Wholesalers	2	0	2	-8	0.19	0.15	X
4233	Lumber and Other Construction Materials Merchant Wholesalers	18	-14	4	5	0.85	0.87	P
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	20	-14	6	-15	0.33	0.32	X
4235	Metal and Mineral (except Petroleum) Merchant Wholesalers	2	-1	1	-7	0.17	0.13	X
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	20	-20	0	11	0.62	0.65	X
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	17	-8	9	-38	0.71	0.61	X
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	65	-43	22	38	0.96	1.01	P
4239	Miscellaneous Durable Goods Merchant Wholesalers	5	3	8	-5	0.18	0.17	X
4241	Paper and Paper Product Merchant Wholesalers	2	-3	-1	-2	0.13	0.12	X
4242	Drugs and Druggists' Sundries Merchant Wholesalers	4	-5	-1	14	0.21	0.26	X
4244	Grocery and Related Product Merchant Wholesalers	63	-2	61	-95	0.84	0.77	X
4245	Farm Product Raw Material Merchant Wholesalers	9	-3	6	-44	1.17	0.78	M
4246	Chemical and Allied Products Merchant Wholesalers	2	-1	1	6	0.15	0.18	P
4247	Petroleum and Petroleum Products Merchant Wholesalers	9	-8	1	-52	0.87	0.51	X
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	23	23	46	18	1.23	1.30	K
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	30	-34	-4	-86	0.90	0.73	X
4251	Wholesale Electronic Markets and Agents and Brokers	21	25	46	-97	0.23	0.17	X

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Two, Part I
York Plus Rural Counties, Transportation and Warehousing

NAICS	Description	2015 - 2021		2015 - 2021		LQ 2015	LQ 2021	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021	Competitive Effect 2015 - 2021			
4821	Rail Transportation	18	-36	-18	-9	4.33	4.10	M
4841	General Freight Trucking	36	-6	30	-82	2.13	1.78	M
4842	Specialized Freight Trucking	26	-2	24	59	3.34	3.77	K
4884	Support Activities for Road Transportation	1	1	2	4	0.50	0.66	P
4931	Warehousing and Storage	21	19	40	51	1.53	1.72	K

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Two, Part J
Core Metro Counties Transportation and Warehousing

NAICS	Description	2015 - 2021		2015 - 2021		LQ 2015	LQ 2021	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021	Competitive Effect 2015 - 2021			
4812	Nonscheduled Air Transportation	4	1	5	13	0.99	1.21	P
4821	Rail Transportation	123	-242	-119	-203	4.91	4.36	M
4841	General Freight Trucking	413	-64	349	695	4.16	4.68	K
4842	Specialized Freight Trucking	52	-4	48	124	1.15	1.35	K
4881	Support Activities for Air Transportation	92	34	126	-79	4.96	4.75	M
4882	Support Activities for Rail Transportation	7	6	13	-29	2.19	1.68	M
4885	Freight Transportation Arrangement	4	1	5	4	0.18	0.20	P
4921	Couriers and Express Delivery Services	33	-21	12	-7	0.61	0.61	X
4931	Warehousing and Storage	53	47	100	-57	0.64	0.60	X

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Two, Part K
York Plus Rural Counties, Finance and Insurance**

NAICS	Description	2015 - 2021	2015 - 2021	2015 - 2021	Competitive Effect	LQ 2015	LQ 2021	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021				
5221	Depository Credit Intermediation	59	-48	11	-28	2.07	1.96	M
5231	Securities and Commodity Contracts Intermediation and Brokerage	3	-2	1	10	0.35	0.44	P
5241	Insurance Carriers	3	-2	1	0	0.17	0.16	X
5242	Agencies, Brokerages, and Other Insurance Related Activities	19	9	28	4	0.96	0.96	P

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Two, Part L
Core Metro Counties Finance and Insurance**

NAICS	Description	2015 - 2021	2015 - 2021	2015 - 2021	Competitive Effect	LQ 2015	LQ 2021	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021				
5221	Depository Credit Intermediation	162	-132	30	-151	0.97	0.92	X
5223	Activities Related to Credit Intermediation	49	19	68	107	1.67	1.92	K
5231	Securities and Commodity Contracts Intermediation and Brokerage	35	-27	8	-32	0.78	0.74	X
5239	Other Financial Investment Activities	20	49	69	-14	0.44	0.43	X
5241	Insurance Carriers	266	-144	122	-671	2.22	1.87	M
5242	Agencies, Brokerages, and Other Insurance Related Activities	165	76	241	137	1.45	1.54	K

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Two, Part M
York Plus Rural Counties, Professional, Scientific, and Technical Services**

NAICS	Description	2015 - 2021	2015 - 2021	2015 - 2021	Competitive Effect	LQ 2015	LQ 2021	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021				
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	9	3	12	0	0.55	0.54	X
5416	Management, Scientific, and Technical Consulting Services	4	10	14	2	0.19	0.19	P
5417	Scientific Research and Development Services	6	2	8	7	0.52	0.55	P

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Two, Part N
Core Metro Counties Professional, Scientific, and Technical Services

NAICS	Description	2015 - 2021	2015 - 2021	2015 - 2021	Competitive Effect	LQ	LQ	Target
		National Effect	Industry Effect	Expected Change		2015 - 2021	2015	
5411	Legal Services	76	-44	32	68	0.68	0.73	P
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	68	20	88	-120	0.69	0.62	X
5413	Architectural, Engineering, and Related Services	94	29	123	3	0.67	0.68	P
5415	Computer Systems Design and Related Services	171	349	520	81	0.89	0.93	P
5416	Management, Scientific, and Technical Consulting Services	66	158	224	-81	0.51	0.48	X
5417	Scientific Research and Development Services	38	11	49	-28	0.58	0.56	X
5418	Advertising, Public Relations, and Related Services	45	4	49	-327	0.92	0.50	X

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Two, Part O
York Plus Rural Counties, Health Care

NAICS	Description	2015 - 2021	2015 - 2021	2015 - 2021	Competitive Effect	LQ	LQ	Target
		National Effect	Industry Effect	Expected Change		2015 - 2021	2015	
6211	Offices of Physicians	26	25	51	5	0.61	0.60	P
6212	Offices of Dentists	9	6	15	-12	0.56	0.50	X
6221	General Medical and Surgical Hospitals	44	12	56	36	0.58	0.59	P

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Two, Part P
Core Metro Counties Health Care**

NAICS	Description	2015 - 2021		2015 - 2021	Competitive	LQ	LQ	Target
		National Effect	Industry Effect	Expected Change 2015 - 2021	Effect 2015 - 2021	2015	2021	
6211	Offices of Physicians	245	234	479	-289	0.97	0.91	X
6212	Offices of Dentists	84	58	142	31	0.93	0.97	P
6213	Offices of Other Health Practitioners	107	279	386	51	1.31	1.36	K
6214	Outpatient Care Centers	66	178	244	-30	0.88	0.87	X
6215	Medical and Diagnostic Laboratories	27	37	64	-23	1.06	1.02	M
6221	General Medical and Surgical Hospitals	383	108	491	-843	0.85	0.74	X
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	27	59	86	26	1.24	1.33	K

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

York County Development Corporation Target Industries Review November 2016

Table Twenty-Three below contains the 14, 4-digit NAICS industries that achieved a target classification of Key (K), Potential (P) or Mature (M) Industries in both York Plus Rural Counties and Core Metro Counties. These 14 industries can form a core of potential target industries for YCDC to consider for further evaluation as potential target industries.

**Table Twenty–Three
Key, Potential, and Mature Industries Located in Both York Plus Rural and Core Metro Counties**

Category	NAICS	York Plus Rural Counties				Core Metro Counties				
		2015–2021 Competitive Effect	2015 LQ	2021 LQ	Class	2015–2021 Competitive Effect	2015 LQ	2021 LQ	Class	
Manufacturing Crop and Animal Related	3111	Animal Food Manufacturing	-34	1.93	1.54	K	80	65.25	69.53	M
	3112	Grain and Oilseed Milling	-53	4.21	3.64	M	-31	9.24	6.92	M
	3116	Animal Slaughtering and Processing	395	6.12	6.76	K	229	17.42	18.97	K
Metal, Metal Products and Machinery Manufacturing	3323	Architectural and Structural Metals Manufacturing	34	2.11	2.20	K	10	3.56	3.61	K
	3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	10	0.87	0.90	K	3	1.33	1.33	P
All Other Manufacturing	3362	Motor Vehicle Body and Trailer Manufacturing	93	0.77	1.21	K	68	9.63	11.26	P
Wholesale Trade	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	38	0.96	1.01	K	41	3.66	3.82	P
	4245	Farm Product Raw Material Merchant Wholesalers	-44	1.17	0.78	K	88	42.27	46.02	M
Transportation and Warehousing	4821	Rail Transportation	-203	4.91	4.36	M	-9	4.33	4.10	M
	4841	General Freight Trucking	695	4.16	4.68	M	-82	2.13	1.78	K
Finance and Insurance	4842	Specialized Freight Trucking	124	1.15	1.35	K	59	3.34	3.77	K
	5242	Agencies, Brokerages, and Other Insurance Related Activities	137	1.45	1.54	P	4	0.96	0.96	K
Professional, Scientific, and Technical Services Health Care	5411	Legal Services	68	0.68	0.73	P	0	0.00	0.00	P
	6213	Offices of Other Health Practitioners	51	1.31	1.36	K	0	0.00	0.00	K

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

York County Development Corporation Target Industries Review November 2016

Table Twenty-Four below contains 17, 4-digit NAICS industries that achieved a target classification of Key (K), Potential (P) or Mature (M) Industries in York Plus Rural Counties. These industries either do not exist or are classified as not further considered in the Core Metro Counties. YCDC may want to consider including these five industries on its list for further evaluation for its target industry program.

**Table Twenty-Four
Industries Classified as Key, Potential or Mature Only in York Plus Rural Counties**

Category	NAICS	York Plus Rural Counties				Core Metro Counties			
		2015–2021 Competitive Effect	2015 LQ	2021 LQ	Class	2015–2021 Competitive Effect	2015 LQ	2021 LQ	Class
Manufacturing Crop and Animal Related	3211 Sawmills and Wood Preservation	0	0.00	0.00	M	-5	1.39	1.14	X
Metal, Metal Products and Machinery Manufacturing	3331 Agriculture, Construction, and Mining Machinery	29	3.42	3.55	M	-16	5.48	5.10	X
All Other Manufacturing	3219 Other Wood Product Manufacturing	-32	0.82	0.72	M	-5	5.62	5.43	X
	3273 Cement and Concrete Product Manufacturing	1	1.32	1.34	M	-1	1.65	1.60	X
	3364 Aerospace Product and Parts Manufacturing	0	0.00	0.00	M	0	1.69	1.65	X
	3391 Medical Equipment and Supplies Manufacturing	-8	0.27	0.26	P	6	0.29	0.37	X
Wholesale Trade	4239 Miscellaneous Durable Goods Merchant	-5	0.18	0.17	P	3	0.37	0.41	X
	4247 Petroleum and Petroleum Products Merchant	-52	0.87	0.51	K	2	2.10	2.19	X
Transportation and Warehousing	4884 Support Activities for Road Transportation	0	0.00	0.00	P	4	0.50	0.66	X
	4931 Warehousing and Storage	-57	0.64	0.60	K	51	1.53	1.72	X
Finance and Insurance	5221 Depository Credit Intermediation	-151	0.97	0.92	M	-28	2.07	1.96	X
	5231 Securities and Commodity Contracts Intermediation	-32	0.78	0.74	P	10	0.35	0.44	X
Professional, Scientific, and Technical Services	5416 Management, Scientific, and Technical Consulting	-81	0.51	0.48	P	2	0.19	0.19	X
	5417 Scientific Research and Development Services	-28	0.58	0.56	P	7	0.52	0.55	X
	5418 Advertising, Public Relations, and Related	-327	0.92	0.50	P	0	0.00	0.00	X
Health Care	6211 Offices of Physicians	-289	0.97	0.91	P	5	0.61	0.60	X
	6214 Outpatient Care Centers	-30	0.88	0.87	P	0	0.00	0.00	X

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Supply Chain Opportunities

Tables Twenty-Five through Thirty-One, below and on the following pages, identify local area, 6-Digit NAICS industries currently supplying a large portion of the total inputs purchased locally by industries in Table Twenty-Three. These industries may be able to increase their sales to Key, Potential, and Mature area industries and may also be considered potential targets for YCDC retention, expansion, and recruitment efforts.

Table Thirty-Two contains those supplying industries with a large presence in both York and the Other Rural Counties and in the Core Metro Counties.

Table Twenty-Five
Amount and Percent of Local Industry Purchases by NAICS 3111 Animal Food
Manufacturing With Total Industry Exports

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
Core Metro				
311224	Soybean and Other Oilseed Processing	42.4	1,152,443	283,684,483
311612	Meat Processed from Carcasses	48.1	3,008,397	282,533,030
423830	Industrial Machinery and Equipment Merchant Wholesalers	53.2	267,366	13,413,033
482110	Rail transportation	46.6	741,346	648,154,713
541330	Engineering Services	52.1	317,635	42,758,790
551114	Corporate, Subsidiary, and Regional Managing Offices	75.0	2,150,902	351,495,492
York Plus Rural Counties				
325193	Ethyl Alcohol Manufacturing	57.8	268,824	273,391,202
423930	Recyclable Material Merchant Wholesalers	68.7	429,955	5,376,039
445110	Supermarkets and Other Grocery (except Convenience) Stores	62.2	363,384	5,621,213
484220	Specialized Freight (except Used Goods) Trucking, Local	74.5	1,019,227	19,383,750
522110	Commercial Banking	50.4	591,001	130,615,543
541211	Offices of Certified Public Accountants	74.3	257,437	6,158,384
722511	Full-Service Restaurants	72.8	444,653	6,669,166
722513	Limited-Service Restaurants	62.0	459,789	11,772,663

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Six
Amount and Percent of Local Industry Purchases by NAICS 3116 Animal Slaughtering and Processing With Total Industry Exports

NAICS	Description	Purchased Out of Region		Exported from
		Percent	Amount \$	Region \$
Core Metro				
311615	Poultry Processing	54.3	18,800,005	75,990,174
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	66.6	470,927	53,143,343
423510	Metal Service Centers and Other Metal Merchant Wholesalers	64.4	546,928	1,699,242
423720	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers	51.6	287,034	16,070,085
423830	Industrial Machinery and Equipment Merchant Wholesalers	41.6	988,600	13,413,033
424410	General Line Grocery Merchant Wholesalers	45.2	616,091	82,878,148
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	59.5	389,993	1,786,719
482110	Rail transportation	55.3	681,283	648,154,713
484122	General Freight Trucking, Long-Distance, Less Than Truckload	57.3	7,387,205	20,542,027
484210	Used Household and Office Goods Moving	74.4	2,485,844	5,475,827
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	57.5	3,700,096	2,922,147
493110	General Warehousing and Storage	74.6	863,570	17,044,244
517110	Wired Telecommunications Carriers	66.8	678,193	91,331,348
522110	Commercial Banking	43.7	1,662,929	152,049,949
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	66.3	2,041,506	22,751,342
541110	Offices of Lawyers	72.6	1,080,620	33,157,771
541330	Engineering Services	71.8	1,847,088	42,758,790
541910	Marketing Research and Public Opinion Polling	50.2	350,395	70,417,607
541990	All Other Professional, Scientific, and Technical Services	66.5	2,065,271	10,409,682
561720	Janitorial Services	59.4	1,019,063	23,471,789
561730	Landscaping Services	62.7	926,675	19,096,963
562910	Remediation Services	65.5	315,339	3,098,412
721110	Hotels (except Casino Hotels) and Motels	37.0	415,351	22,672,774
York Plus Rural Counties				
445110	Supermarkets and Other Grocery (except Convenience) Stores	65.9	494,422	5,621,213
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	41.8	1,748,176	27,732,807
522110	Commercial Banking	55.2	1,273,016	130,615,543
722513	Limited-Service Restaurants	66.4	733,038	11,772,663

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Seven
Amount and Percent of Local Industry Purchases by NAICS 4238 Machinery, Equipment, and Supplies Merchant Wholesalers With Total Industry Exports

NAICS	Description	Purchased Out of Region		Exported from
		Percent	Amount \$	Region \$
Core Metro				
492110	Couriers and Express Delivery Services	51.8	1,215,062	17,584,117
493110	General Warehousing and Storage	72.7	1,404,959	17,044,244
515120	Television Broadcasting	65.7	295,825	3,820,374
517110	Wired Telecommunications Carriers	59.6	517,213	91,331,348
522110	Commercial Banking	42.5	293,794	152,049,949
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	44.7	675,071	36,863,015
531210	Offices of Real Estate Agents and Brokers	64.1	759,275	28,313,878
531311	Residential Property Managers	64.1	370,506	15,524,557
531390	Other Activities Related to Real Estate	74.8	524,339	17,150,276
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	63.4	682,374	22,751,342
541110	Offices of Lawyers	69.0	716,819	33,157,771
541512	Computer Systems Design Services	72.2	272,540	30,407,303
541611	Administrative Management and General Management Consulting Services	63.5	690,798	22,060,648
541810	Advertising Agencies	46.6	463,404	13,650,709
561422	Telemarketing Bureaus and Other Contact Centers	46.3	263,219	45,891,835
561990	All Other Support Services	52.7	267,759	6,270,868
901149	US Postal Service	48.0	517,360	27,621,990
York Plus Rural Counties				
517110	Wired Telecommunications Carriers	68.9	375,502	40,630,236
531110	Lessors of Residential Buildings and Dwellings	58.7	582,345	13,785,679
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	74.3	704,593	7,998,160
901149	US Postal Service	57.2	387,239	10,967,469

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Eight
Amount and Percent of Local Industry Purchases by NAICS 4245 Farm Product Raw Material
Merchant Wholesalers With Total Industry Exports

NAICS	Description	Purchased Out of Region		Exported from
		Percent	Amount \$	Region \$
Core Metro				
493110	General Warehousing and Storage	72.5	284,745	17,044,244
York Plus Rural Counties				
517110	Wired Telecommunications Carriers	62.2	367,019	40,630,236
531110	Lessors of Residential Buildings and Dwellings	62.1	667,047	13,785,679
541211	Offices of Certified Public Accountants	62.8	275,572	6,158,384
901149	US Postal Service	55.7	407,933	10,967,469

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Nine
Amount and Percent of Local Industry Purchases by NAICS 4842 Specialized Freight Trucking With
Total Industry Exports

NAICS	Description	Purchased Out of Region		Exported from
		Percent	Amount \$	Region \$
Core Metro				
482110	Rail transportation	37.9	474,155	648,154,713
492110	Couriers and Express Delivery Services	56.7	2,552,339	17,584,117
493110	General Warehousing and Storage	70.8	847,914	17,044,244
522110	Commercial Banking	41.2	279,567	152,049,949
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	51.0	266,457	7,961,408
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	60.4	427,471	22,751,342
901149	US Postal Service	48.7	924,244	27,621,990
York Plus Rural Counties				
901149	US Postal Service	57.6	537,986	10,967,469

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Thirty
Amount and Percent of Local Industry Purchases by NAICS 5411 Legal Services With Total Industry Exports

NAICS	Description	Purchased Out of Region		Exported from
		Percent	Amount \$	Region \$
Core Metro				
492110	Couriers and Express Delivery Services	63.3	250,766	17,584,117
517110	Wired Telecommunications Carriers	42.9	618,201	91,331,348
517210	Wireless Telecommunications Carriers (except Satellite)	50.2	303,867	37,252,328
522110	Commercial Banking	39.4	594,663	152,049,949
531110	Lessors of Residential Buildings and Dwellings	36.1	781,558	33,538,252
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	41.4	857,798	36,863,015
531210	Offices of Real Estate Agents and Brokers	50.1	814,631	28,313,878
531311	Residential Property Managers	46.4	367,252	15,524,557
531312	Nonresidential Property Managers	64.5	320,843	7,226,535
531390	Other Activities Related to Real Estate	63.8	613,247	17,150,276
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	56.3	438,635	22,751,342
541110	Offices of Lawyers	57.8	950,481	33,157,771
541512	Computer Systems Design Services	49.1	379,946	30,407,303
541519	Other Computer Related Services	72.7	292,508	2,410,694
541611	Administrative Management and General Management Consulting Services	54.6	279,245	22,060,648
551114	Corporate, Subsidiary, and Regional Managing Offices	72.7	2,658,147	351,495,492
561320	Temporary Help Services	38.7	289,181	42,981,634
721110	Hotels (except Casino Hotels) and Motels	41.9	276,977	22,672,774

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Thirty-One
Amount and Percent of Local Industry Purchases by NAICS 6213 Offices of Other Health Practitioners With Total Industry Exports

NAICS	Description	Purchased Out of Region		Exported from
		Percent	Amount \$	Region \$
Core Metro				
325120	Industrial Gas Manufacturing	52.9	254,010	13,223,426
325412	Pharmaceutical Preparation Manufacturing	53.3	360,017	314,565,395
517110	Wired Telecommunications Carriers	49.5	282,465	91,331,348
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	42.7	668,461	36,863,015
531210	Offices of Real Estate Agents and Brokers	55.6	683,091	28,313,878
531311	Residential Property Managers	53.4	319,473	15,524,557
531390	Other Activities Related to Real Estate	68.1	494,931	17,150,276
541110	Offices of Lawyers	62.2	285,406	33,157,771

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Thirty Two
In-region Purchases and Total Exports, Selected Industries Supplying Potential Targets

NAICS	Description	York Plus Rural Counties		Core Metro Counties	
		In-region Purchases \$	Exported from Region \$	In-region Purchases \$	Exported from Region \$
336390	Other Motor Vehicle Parts Manufacturing	2,319,930	356,136,643	2,631,329	58,017,950
482110	Rail transportation	133,779	99,881,636	667,560	648,154,713
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	2,438,021	27,732,807	2,738,752	2,922,147
517110	Wired Telecommunications Carriers	169,287	40,630,236	350,210	91,331,348
522110	Commercial Banking	1,804,394	130,615,543	9,208,612	152,049,949
524210	Insurance Agencies and Brokerages	2,562,366	39,755,426	20,046,629	48,360,772
531110	Lessors of Residential Buildings and Dwellings	163,512	13,785,679	2,374,109	33,538,252
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	243,880	7,998,160	835,108	36,863,015
532490	Other Commercial and Industrial Machinery and Equipment Rental and Leasing	688,050	11,049,229	6,327,548	29,598,998
541211	Offices of Certified Public Accountants	125,727	6,158,384	1,590,091	20,174,982
561720	Janitorial Services	157,070	9,009,295	1,843,430	23,471,789

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Appendix A

Retail Leakages

City of York and Peer Communities

September 2016

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Retail Leakages, York and Peer Communities, September 2016

In 2015, the City of York’s per capita, non-motor vehicle taxable retail sales of \$23,685 was 1.94 times the Nebraska statewide average of \$12,129 for incorporated places. The City of York’s retail pull factor (the City of York’s per capita, non-motor vehicle taxable retail sales divided by the statewide average or 1.94) was the thirteenth highest among the 564 communities reporting this value in 2015. Based upon its overall retail pull factor, the City of York has a very strong retail sector relative to other incorporated communities throughout the state.

Overall, the City of York’s retail trade sector appears to be doing very well. However, there may be opportunities for growth within this broad industry. To identify possible targets for expansion efforts within the general retail trade sector, data on the City of York’s retail sales and employment at the 3-Digit, NAICS (North American Industrial Classification System) level are compared to similar data for a set of five like-sized Nebraska, Peer Communities, shown in Table A-One below. Each Peer Community has a retail pull factor between 1.20 and 3.40 with a population between 4,000 and 12,000. Figure One on the following pages shows the geographic distribution of the counties containing Peer Communities.

Table A-One

Incorporated Nebraska Places with 2015 Populations of 4,000–12,000 and Pull Factors of 120–400 (Peer Communities) with Associated Counties								
Part A								
Pull Factor, 2009–2015								
Place	County	2009	2010	2011	2012	2013	2014	2015
York	York	1.88	1.89	1.94	1.96	1.97	1.93	1.94
Sidney	Cheyenne	1.94	1.80	1.88	1.92	1.91	1.80	1.76
Lexington	Dawson	1.22	1.26	1.28	1.25	1.26	1.24	1.22
Ogallala	Keith	1.67	1.62	1.63	1.69	1.62	1.65	1.85
McCook	Red Willow	1.72	1.72	1.76	1.83	1.74	1.77	1.62
Blair	Washington	1.22	1.18	1.16	1.35	1.31	1.34	1.37
Part B								
Population, 2009–2015								
Place	County	2009	2010	2011	2012	2013	2014	2015
York	York	7,638	7,766	7,857	7,910	7,927	7,952	7,864
Sidney	Cheyenne	6,331	6,757	6,739	6,801	6,805	6,896	6,942
Lexington	Dawson	10,275	10,230	10,232	10,142	10,155	10,116	10,075
Ogallala	Keith	4,391	4,737	4,657	4,650	4,595	4,588	4,570
McCook	Red Willow	7,410	7,698	7,673	7,683	7,702	7,604	7,580
Blair	Washington	7,700	7,990	8,002	8,003	7,975	7,988	7,975

Data sources:

U.S. Census Bureau, July 2016.

Nebraska Department of Revenue, May 2016.

Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Figure A-One
Counties with Peer Communities**

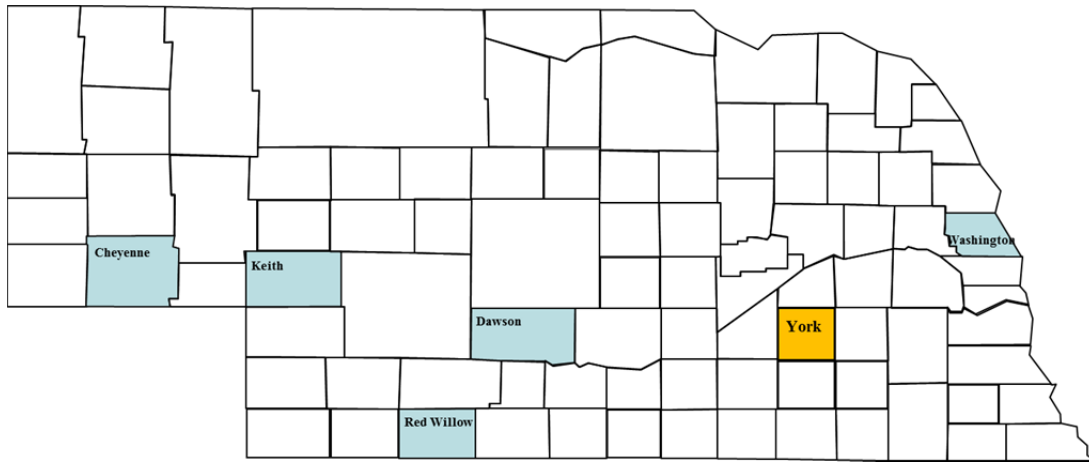


Table A-Two below provides information on 2015 employment and 2014 sales at the 2- and 3-Digit, NAICS industry level for the City of York and the total of the five peer communities. These data indicate a strong presence for each of the 3-Digit retail industries in the City of York and the peer communities.

Table A-Two

Retail Industry, 2015 Jobs & 2014 Sales City of York and Total of Five Peer Communities					
NAICS	Description	Peer Communities		City of York	
		Jobs 2015	Sales 2014	Jobs 2015	Sales 2014
44	Retail Trade	4,074	232,090,160	827	38,907,622
441	Motor Vehicle and Parts Dealers	1,013	39,415,175	92	6,763,382
442	Furniture and Home Furnishings Stores	62	8,098,316	11	1,301,790
443	Electronics and Appliance Stores	91	11,263,416	33	1,807,505
444	Building Material and Garden Equipment and Supplies Dealers	195	20,212,094	32	3,248,668
445	Food and Beverage Stores	467	31,399,781	85	5,564,088
446	Health and Personal Care Stores	146	21,041,273	28	3,418,683
447	Gasoline Stations	436	9,065,182	215	1,474,710
448	Clothing and Clothing Accessories Stores	51	16,874,063	37	2,716,248
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores	240	7,466,554	13	1,195,444
452	General Merchandise Stores	1,073	32,539,437	230	5,824,979
453	Miscellaneous Store Retailers	131	16,624,360	40	2,677,893
454	Non-store Retailers	169	18,090,509	11	2,914,232

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table A-Three below contains estimates of 2014 total local demand and percent of local demand met by imports (met by firms located outside the Peer Communities or outside the City of York) for retail trade products purchased by residents and businesses within the City of York and the Peer Communities. For the two industries shaded and in bold in Table Three, the City of York experienced both substantial import levels and much higher than the Peer Community averages of the percentage of local demand met by imports. These two industries, NAICS 441, Motor Vehicle Parts and Dealers and NAICS 451, Sporting Goods, Hobby, Musical Instrument and Book Stores are rated as likely or good candidates for expansion efforts.

Table A-Three

Total Demand and Demand Met by Imports by Retail Industry, City of York & Average of Five Peer Communities, 2014					
NAICS	Demand for Industry	York			Average of Peers
		Total Demand	Demand met by Imports	% Demand met by Imports	% Demand met by Imports
44	Retail Trade	38,907,622	23,884,883	61.4%	59.2%
441	Motor Vehicle and Parts Dealers	6,763,382	4,503,619	66.6%	31.6%
442	Furniture and Home Furnishings Stores	1,301,790	936,508	71.9%	73.3%
443	Electronics and Appliance Stores	1,807,505	1,167,128	64.6%	71.0%
444	Building Material and Garden Equipment and Supplies Dealers	3,248,668	1,835,737	56.5%	69.1%
445	Food and Beverage Stores	5,564,088	2,720,131	48.9%	45.2%
446	Health and Personal Care Stores	3,418,683	2,227,512	65.2%	69.0%
447	Gasoline Stations	1,474,710	641,048	43.5%	57.7%
448	Clothing and Clothing Accessories Stores	2,716,248	1,824,139	67.2%	85.0%
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores	1,195,444	1,054,463	88.2%	70.6%
452	General Merchandise Stores	5,824,979	2,977,189	51.1%	51.6%
453	Miscellaneous Store Retailers	2,677,893	1,546,597	57.8%	64.3%
454	Nonstore Retailers	2,914,232	2,450,812	84.1%	89.1%

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.