



pennsylvania
DEPARTMENT OF GENERAL SERVICES

Information as of 7-26-16.
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WELCOME

July 26, 2016

DGS Annex Surplus Lands - Public Meeting

Julien F. Gaudion

Deputy Secretary for Property
and Asset Management

PA Department of General Services

Elizabeth N. Woods

Director

Bureau of Real Estate

PA Department of General Services



land planning
landscape architecture
civil engineering



Introductions / Project Overview

Mark Hackenburg, RLA

1.0





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Project Management
Civil Engineering
Landscape Architecture
Zoning and Land Use Analysis
Stakeholder Meetings
Report Preparation



AICP Planner
Stakeholder Meetings
Planning Analysis



Phase I Environmental Site Assessments
Asbestos Investigation
Remediation Cost Estimates
Demolition Cost Estimate



Market Research Assessment
Financial Impact Analysis
Economic Impact Analysis
Tax Rate Impacts
Job Creation Analysis
Cash Value Analysis



Historic Resource Assessment



Appraisal Services
Highest and Best Use Analysis

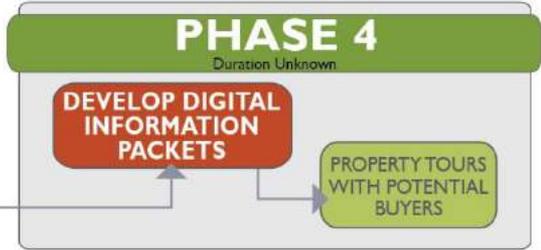
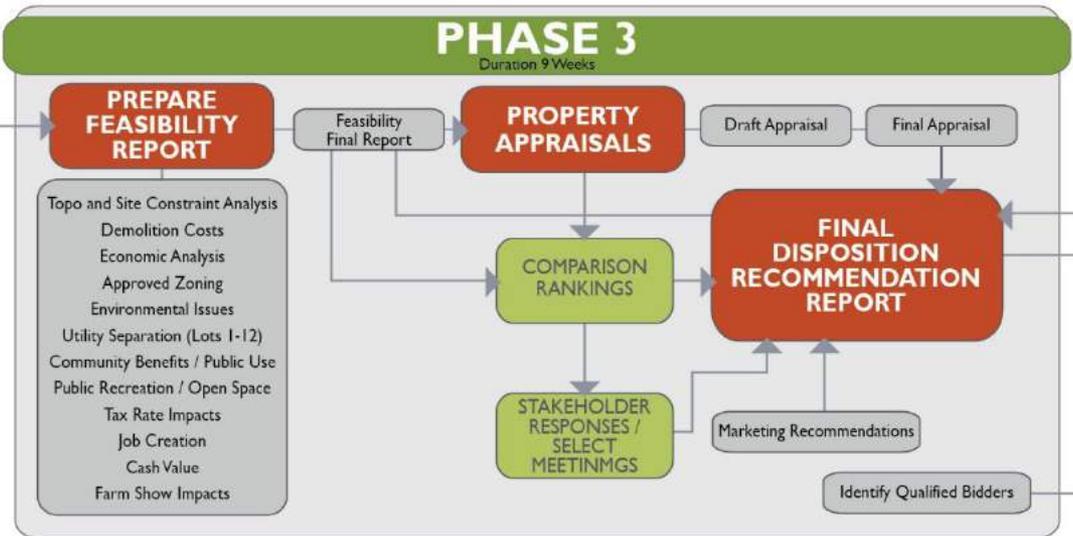
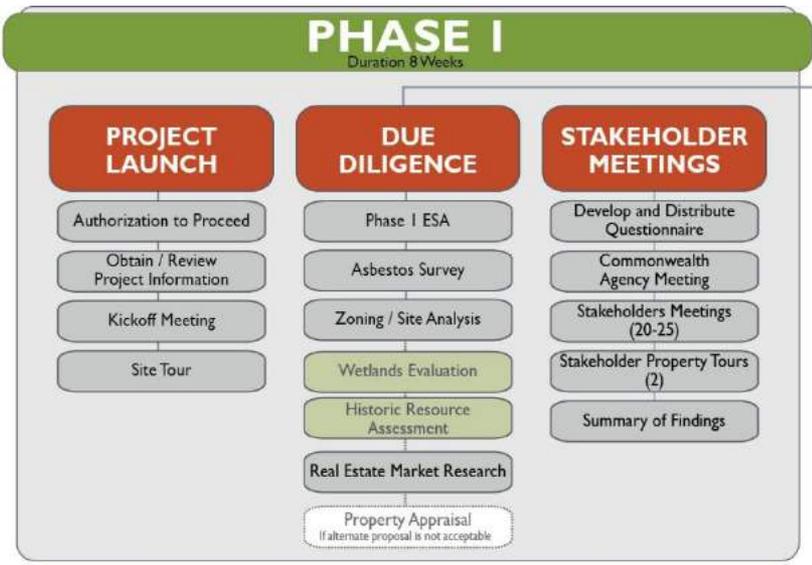


Commercial Real Estate Assessment
Support Materials Preparation



Project Phasing

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Why Consider Selling?

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New development serves as a regional catalyst for
Strong Economic Expansion Opportunities

Contributes to local economy by
Returning Properties to Tax Rolls

Responsible Stewardship
of taxpayer dollars

Employee relocation to
modern facilities results in
Operational Efficiencies

State's commitment to
Downtown Revitalization

Regional Job Growth

Current operating costs
Exceed \$6 Million/Year

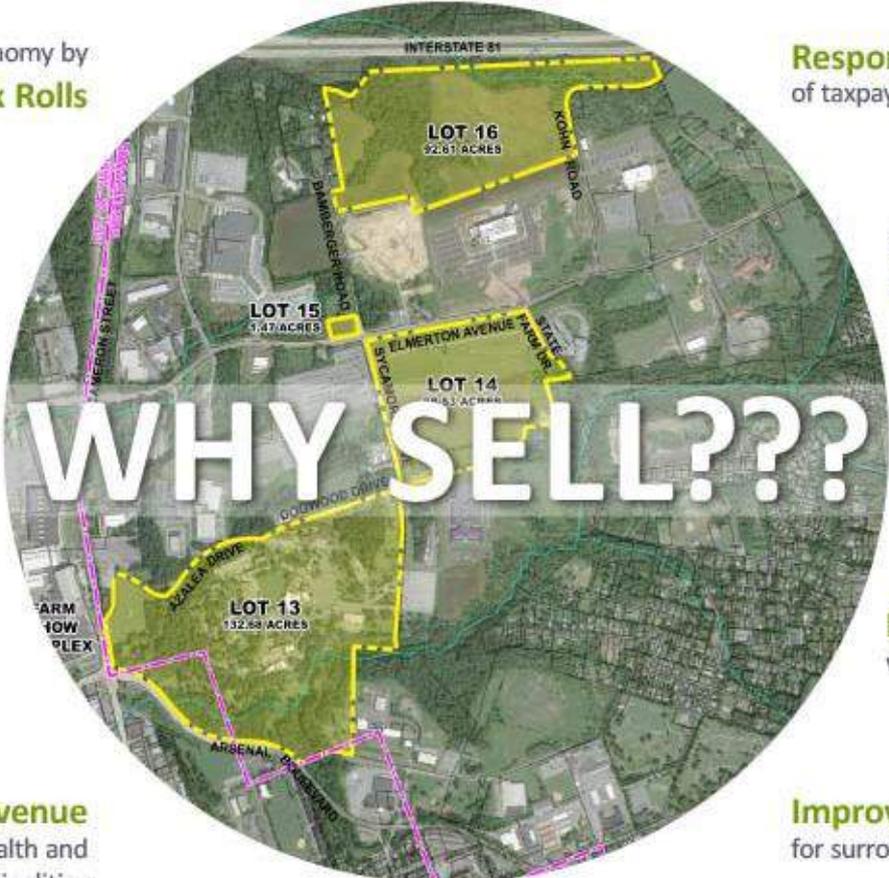
Reduce/avoid costs associated with
Aging Infrastructure

Buildings Near End of Useful Life
without significant reinvestment

Generate Revenue
for the Commonwealth and
local municipalities

Improved Quality of Life
for surrounding communities

Great potential for
Commercial Redevelopment





Stakeholder Input

Tracey Vernon, PP, AICP

2.0



28 Stakeholder Organizations Identified

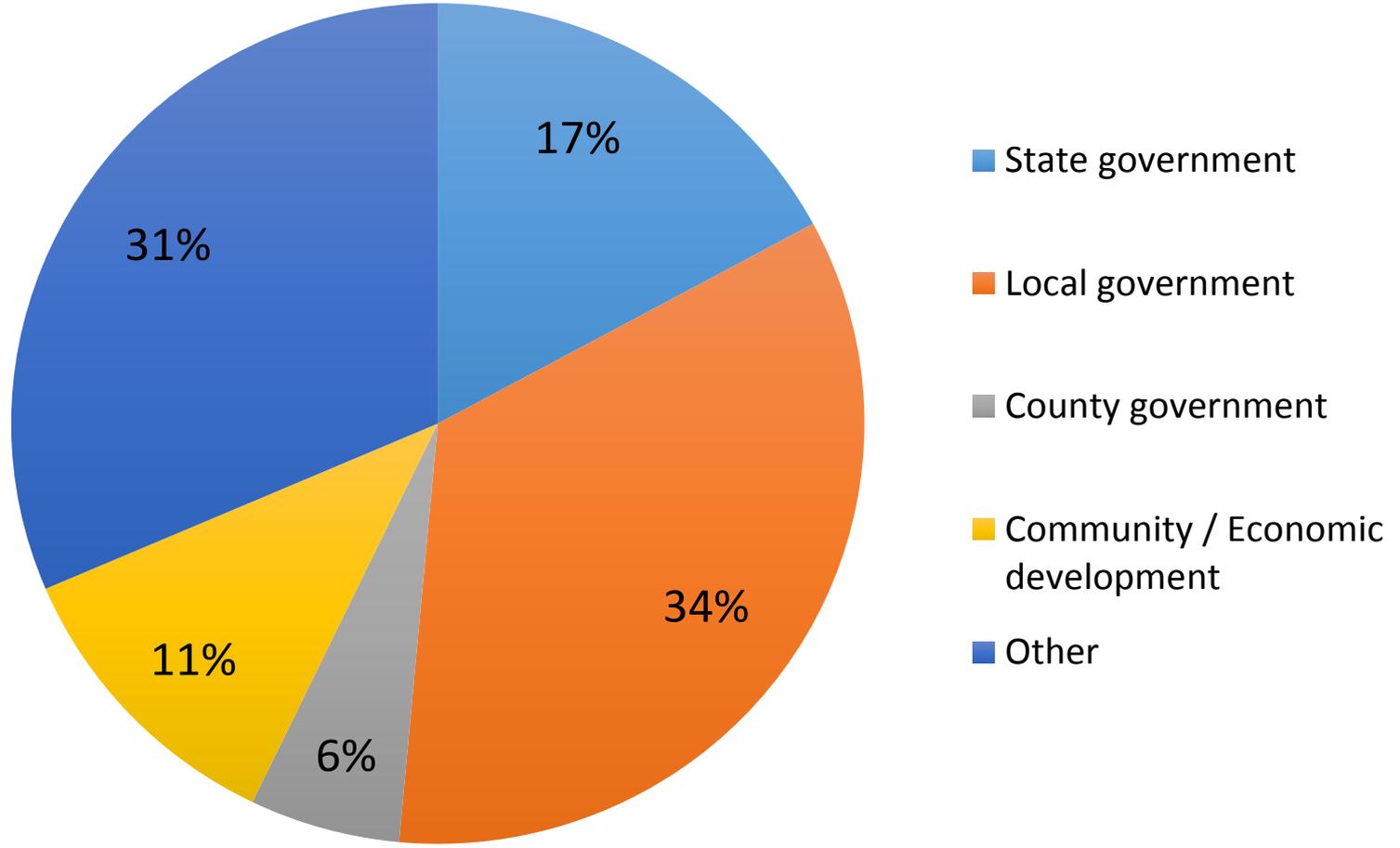
Types of Engagement

- Online questionnaire
 - Administered to 28 stakeholders representing each stakeholder organization
 - Questionnaire link open from February 26 – March 10
 - 35 individuals representing 19 of the 26 stakeholder organizations responded (73%)
- Stakeholder Meetings
 - 22 meetings conducted between February 29 – May 5

Questionnaire Results

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Survey respondents by organization type



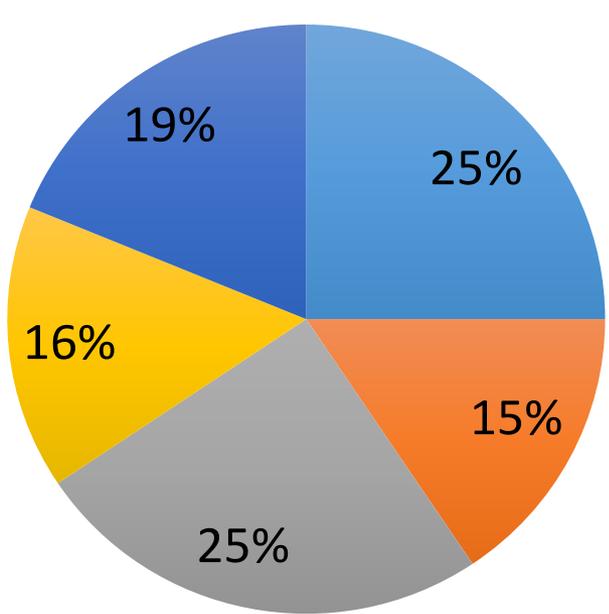
Questionnaire Results

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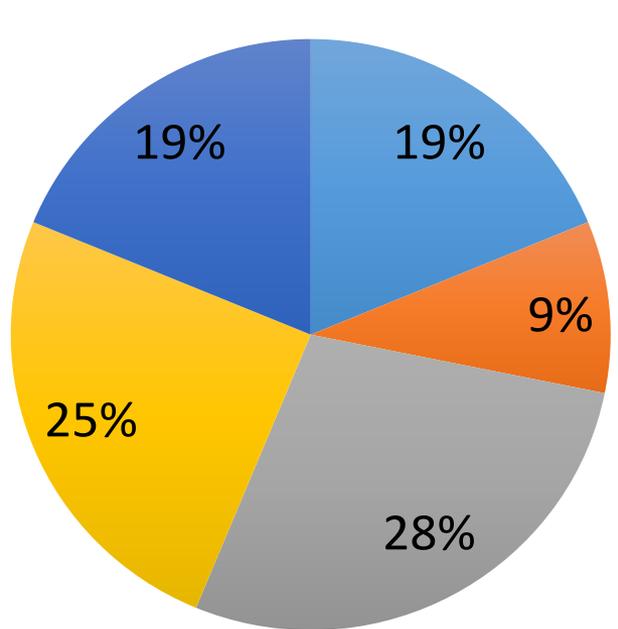
Fairly Equal Opinions on the Impact of Sale & Redevelopment

Would sale or redevelopment have negative or positive impacts?

Organization/Constituents



Local Community



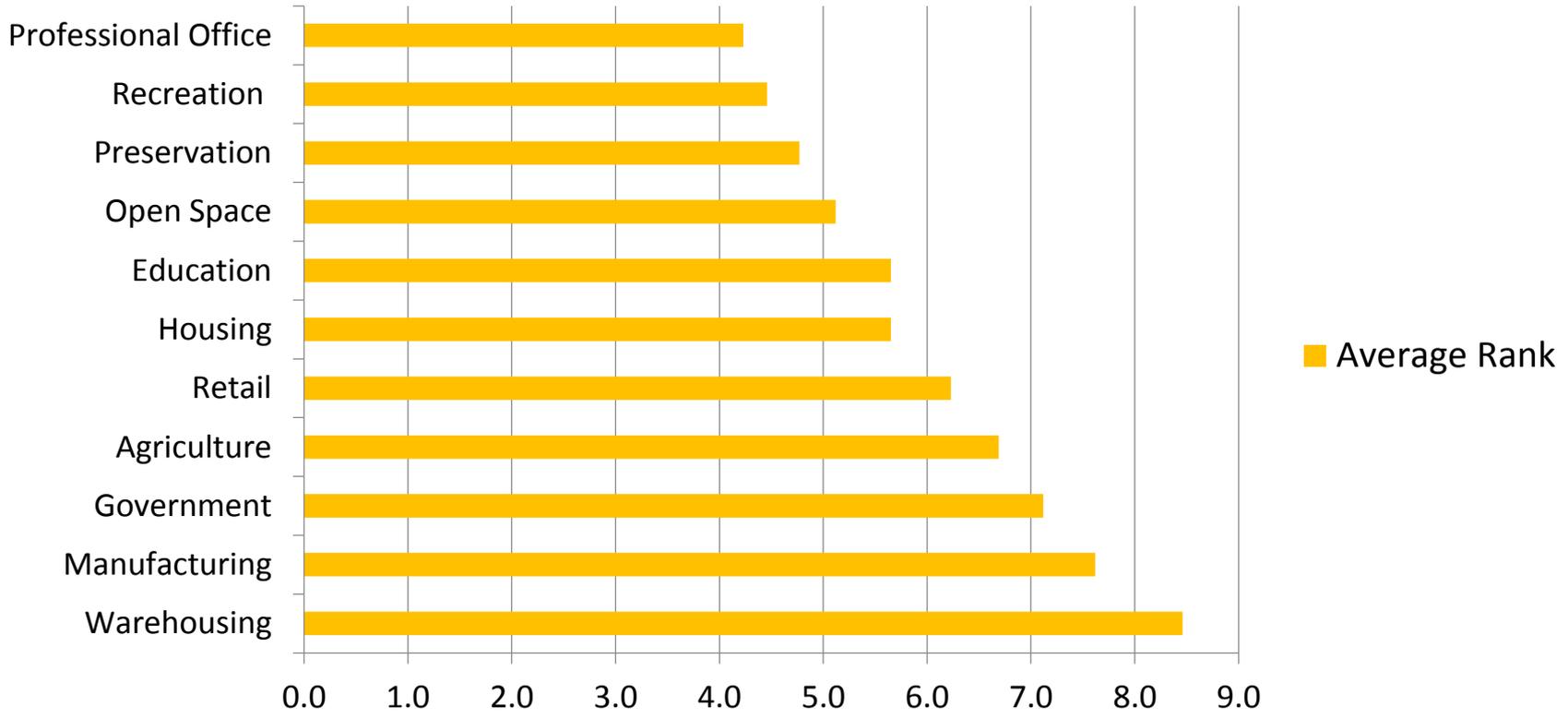
- 1 - Negative
- 2
- 3
- 4
- 5 - Positive

Questionnaire Results

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Professional Office Ranked Most Beneficial; Warehousing Ranked Least Beneficial

How would you rank the following as potential land uses/redevelopment opportunities?

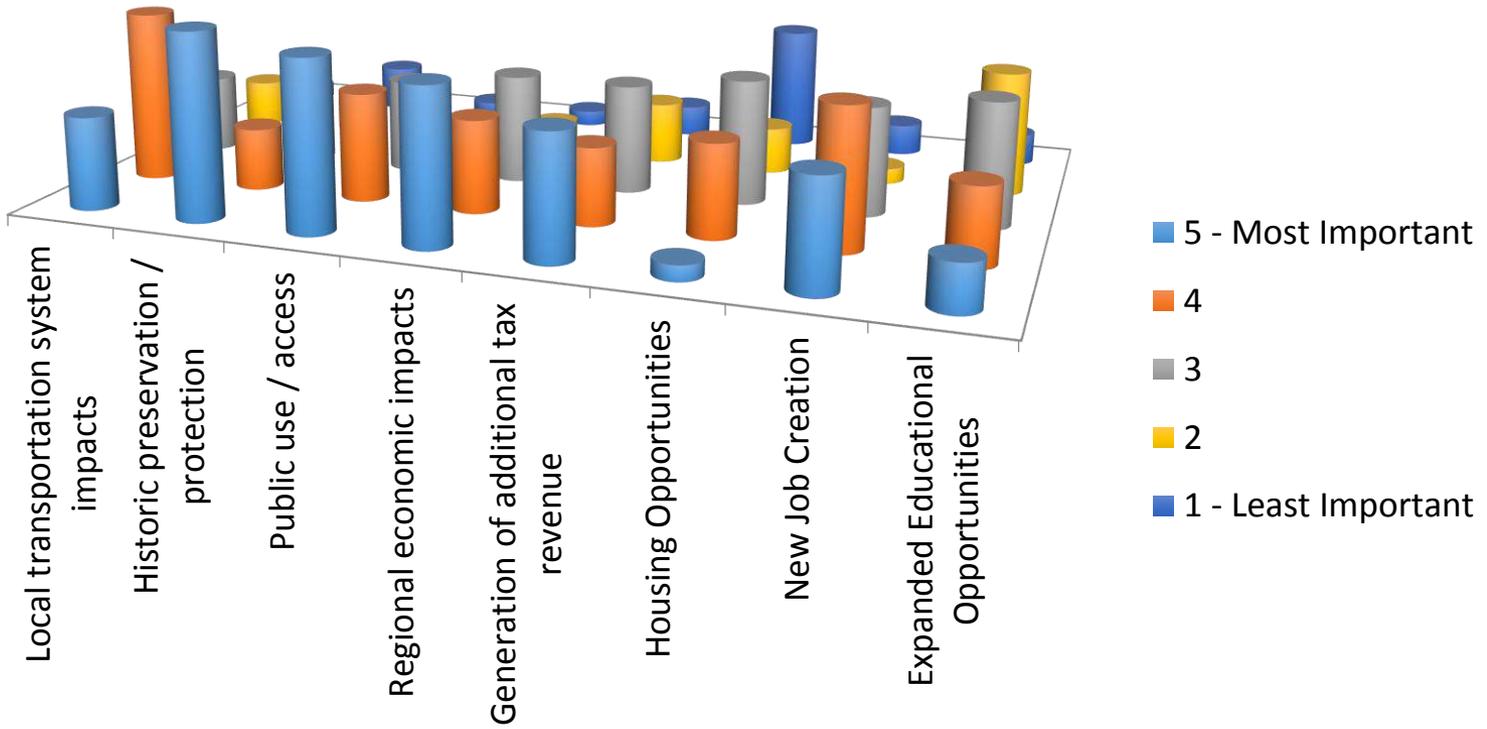


Questionnaire Results

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Preservation & Public Access are Priority Factors for Future Redevelopment

How important are each of the following factors to your organization/constituents?

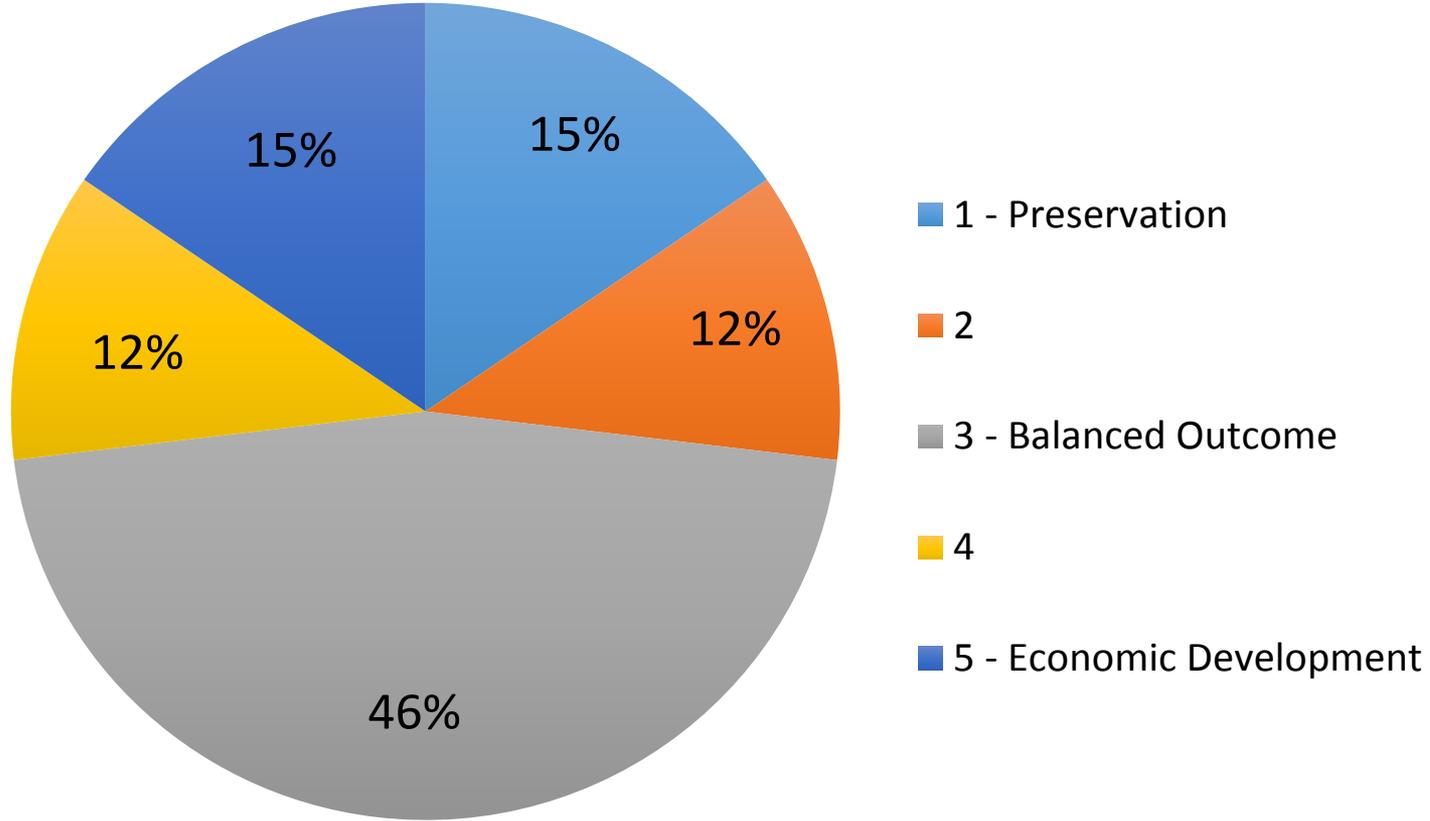


Questionnaire Results

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Nearly 50% of Respondents Seek a Balanced Approach

Which is more important: preserving / protecting resources, creating new opportunities for economic development, or a combination of both?



Stakeholder Feedback

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STAKEHOLDER CONCERNS
SHOULD BE ACCOMMODATED



maintain and
enhance the
**CAPITAL AREA
GREENBELT**

TRANSPORTATION ACCESS



BALANCE

current uses,
historic resources,
and green space with

REDEVELOPMENT

emergency operations



support the
**PA FARM SHOW
& EXPO CENTER**

MINIMIZE
TRAFFIC IMPACTS



maintain the
**COMMUNITY
GARDENS**



**AGRICULTURAL
PRESERVATION**



generate tax revenues and increase
the region's median income

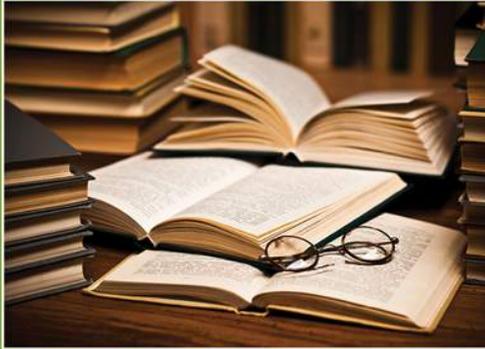
REDEVELOPING THE HARRISBURG STATE HOSPITAL

property provides the community with a

unique opportunity

REDEVELOPMENT
should compliment
**DOWNTOWN
HARRISBURG**
and the
**SURROUNDING
REGION**





Zoning / Site Analysis Findings

Mark Hackenburg, RLA

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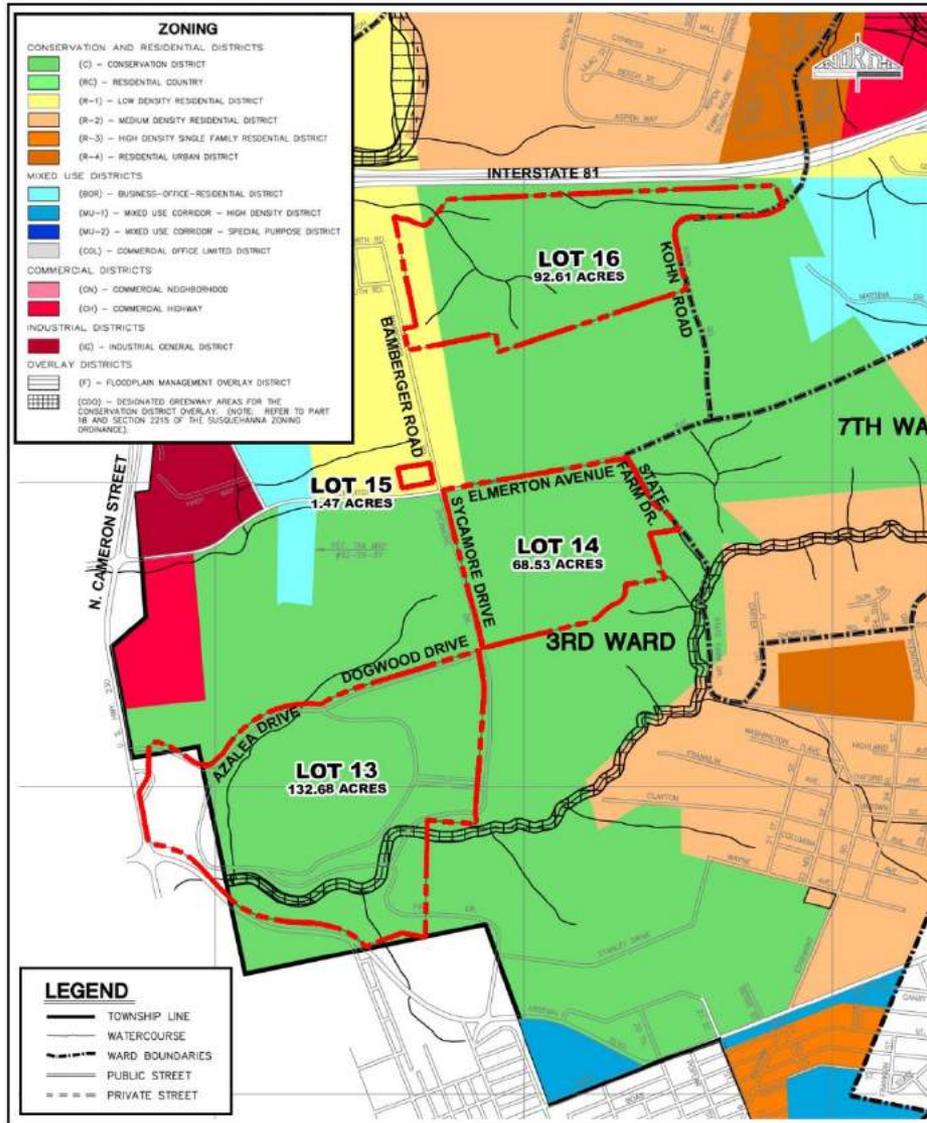
Project Site – Zoning & Site Analysis

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Zoning - Susquehanna Township

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Existing Zoning – Largely Conservation Zoned

- Lot 13 = 132.7 acres C Zone
 - Portion of Lot 13 lacks zoning designation (boundary discrepancy; likely C Zone)
- Lot 14 = 68.5 acres C Zone
- Lot 15 = 1.5 acres R-1 Zone
- Lot 16 = 6.3 acres R-1 / 86.3 acres C Zone (92.6 ac.)

C - Conservation Zone Permitted Uses

- Single Family
- Public and Municipal Uses
- Preservation / Parks
- Utilities
- Campgrounds (SE)

R-1 – Residential Zone Permitted Uses

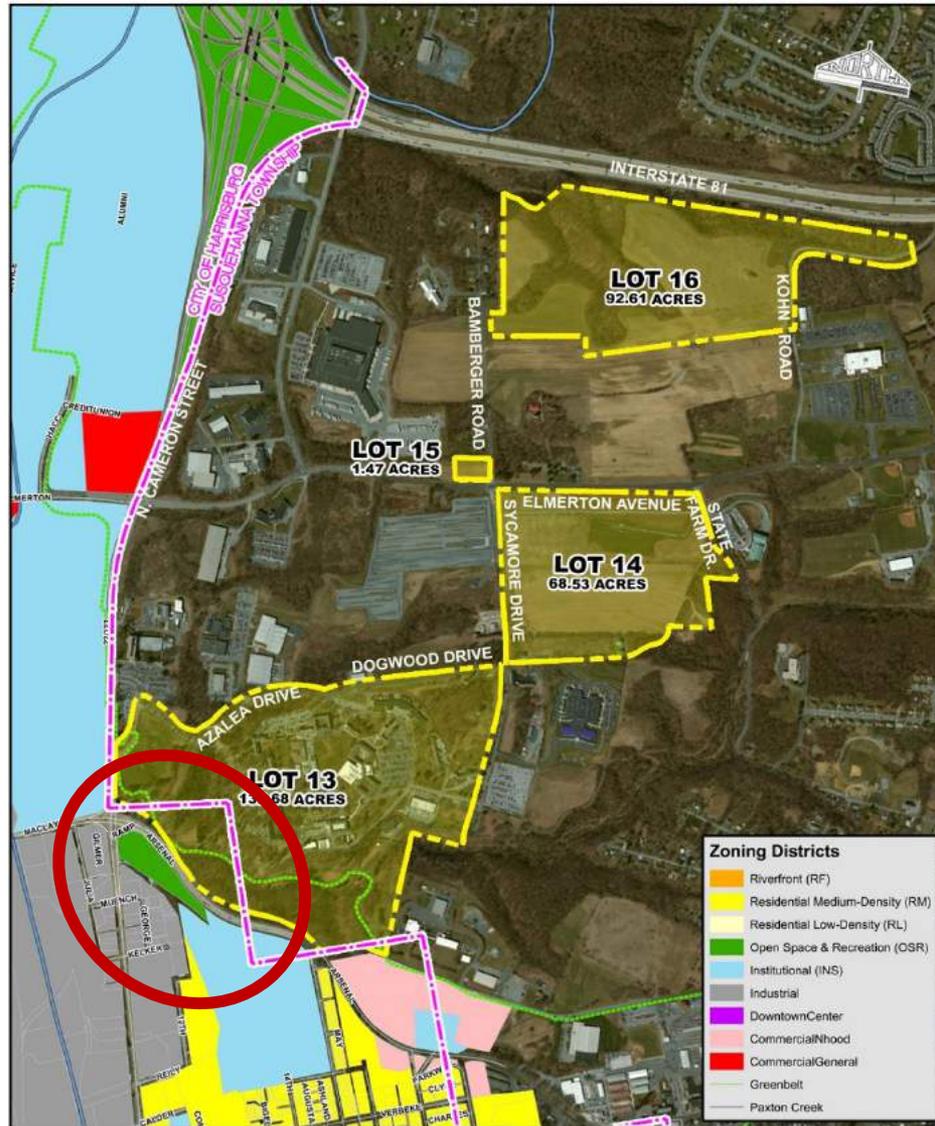
- Agriculture
- Single Family
- Public and Municipal Uses
- Parks
- Utilities

Churches



Zoning – City of Harrisburg

Information as of 7-26-16.
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Existing Zoning – Likely OSR Zoned

- Lot 13 = 4.5 acres in City of Harrisburg
 - Portion of Lot 13 lacks zoning designation (boundary discrepancy; likely OSR Zone)

OSR – Open Space & Recreation Zone

Permitted Uses

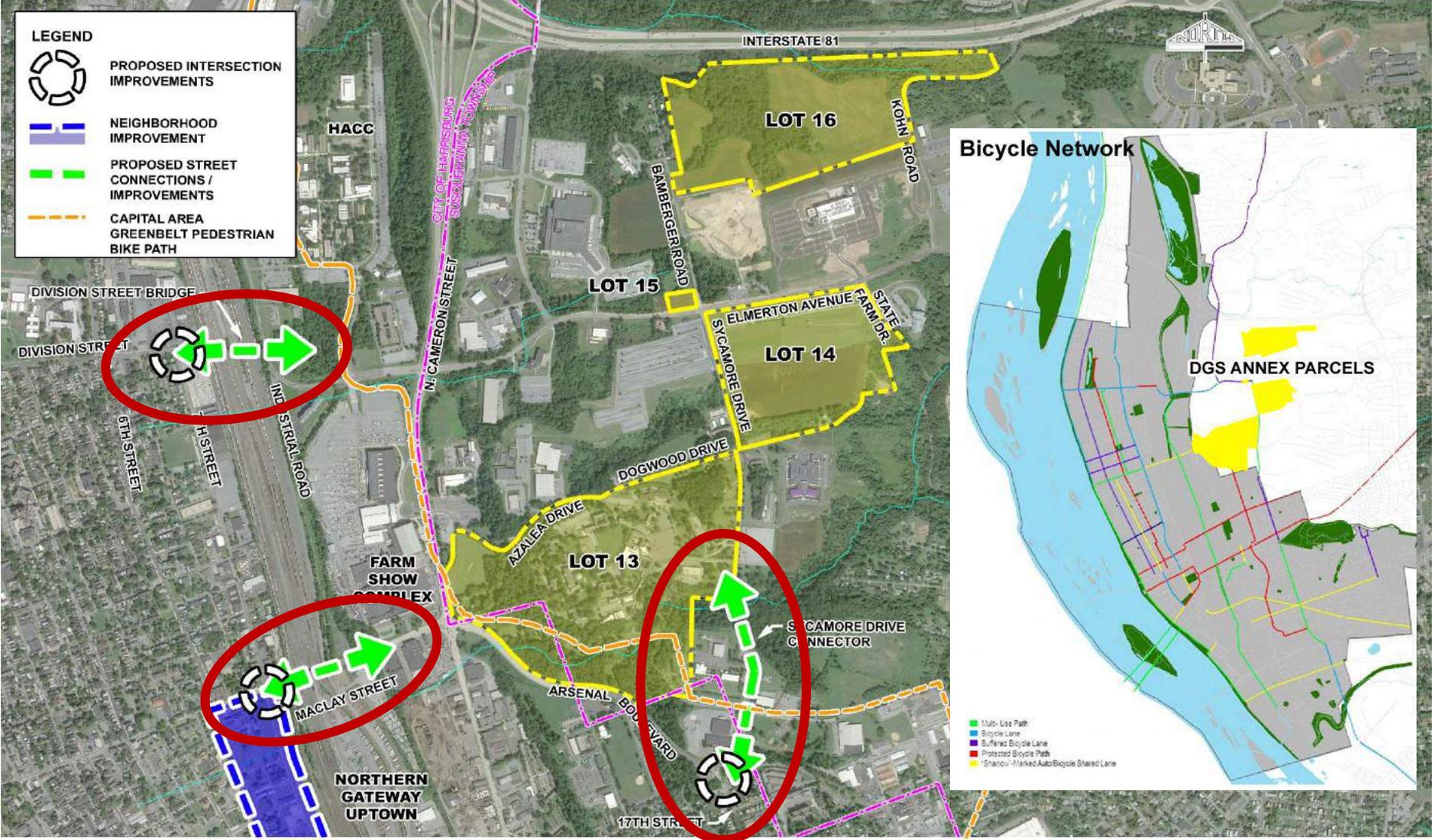
- Animal stables
- Essential services
- Natural area or wildlife refuge
- Public utility facility
- Public and outdoor recreation areas
- Public swimming pool

Special Exception Uses

- Cemetery
- Communication tower/antenna
- Community center / Library
- Municipal owned uses
- Indoor and outdoor theaters
- Urban agriculture/livestock
- Wind or solar energy facilities
- Accessory parking lots or structures

Regional Transportation Improvements

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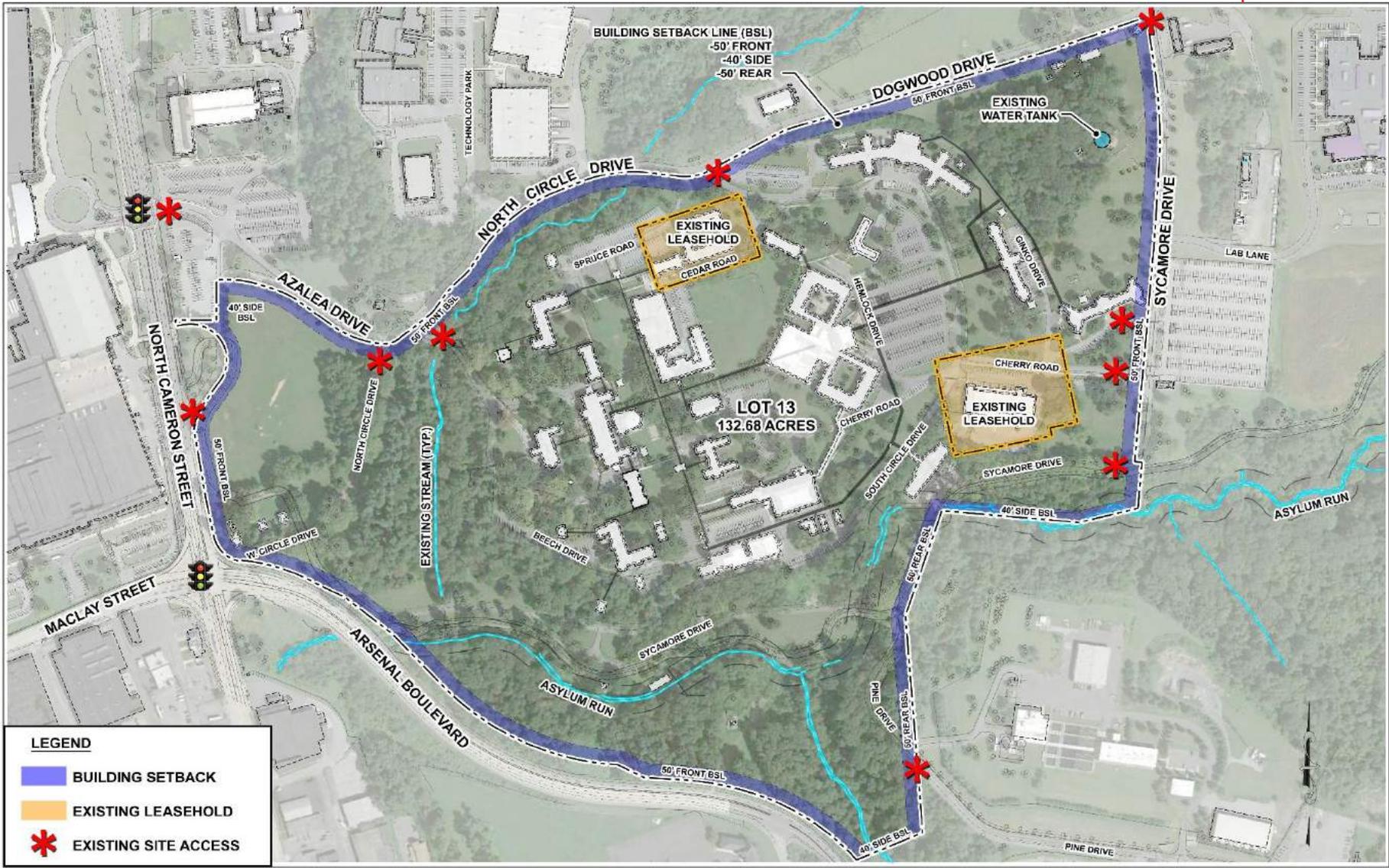
Site Analysis – Lot 13

Information as of 7-26-16.
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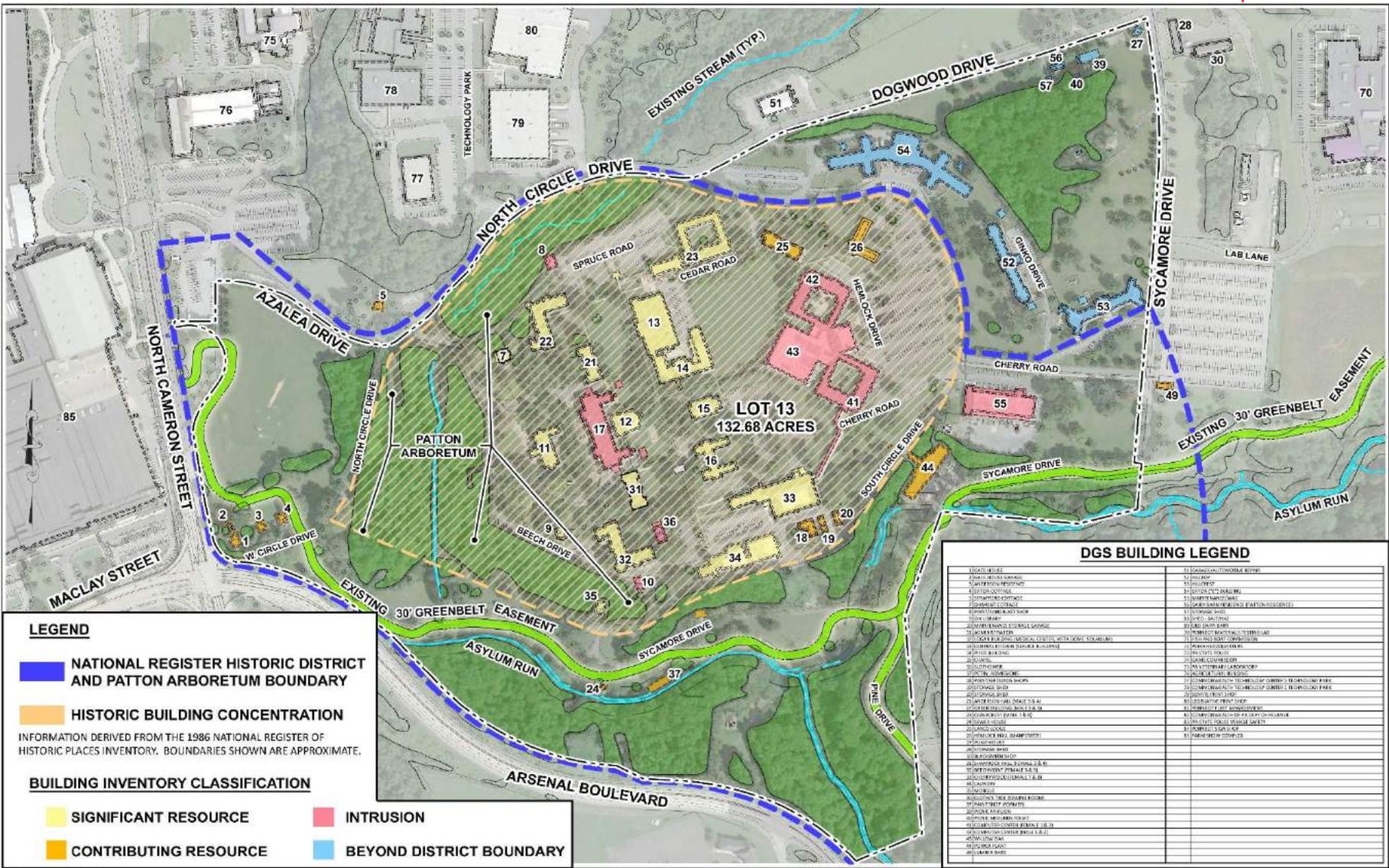
Lot 13 - Site Features

Information as of 7-26-16.
Final Information Pending
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Lot 13 – Historic Resources

Information as of 7-26-16.
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LEGEND

NATIONAL REGISTER HISTORIC DISTRICT AND PATTON ARBORETUM BOUNDARY

HISTORIC BUILDING CONCENTRATION

INFORMATION DERIVED FROM THE 1986 NATIONAL REGISTER OF HISTORIC PLACES INVENTORY. BOUNDARIES SHOWN ARE APPROXIMATE.

BUILDING INVENTORY CLASSIFICATION

SIGNIFICANT RESOURCE **INTRUSION**

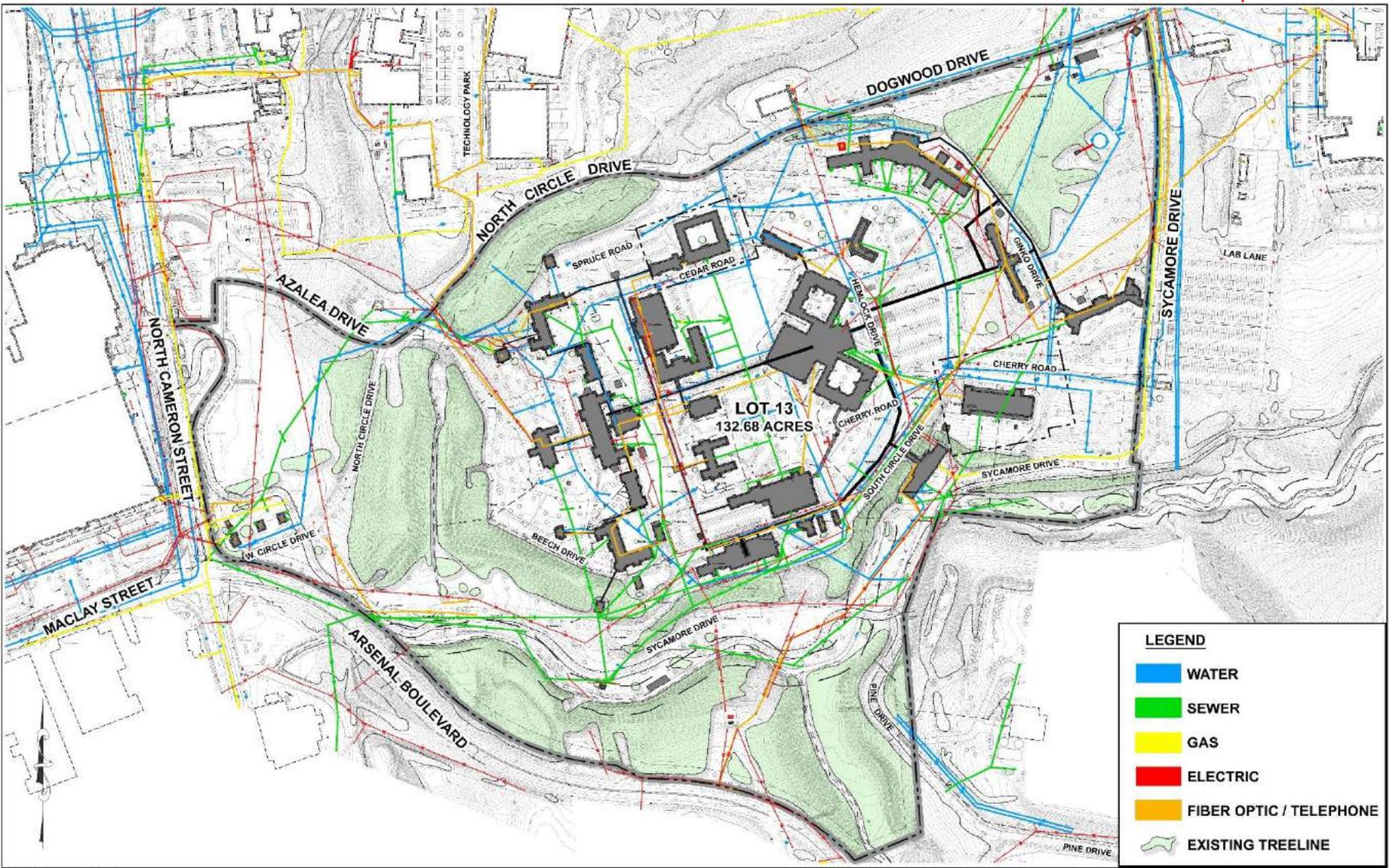
CONTRIBUTING RESOURCE **BEYOND DISTRICT BOUNDARY**

DGS BUILDING LEGEND

| | |
|--------------|------------------------------|
| 1. BARN | 31. BOARDWALK/TERRACE BOILER |
| 2. BARRACKS | 32. BOLLER |
| 3. BARRACKS | 33. BOLLER |
| 4. BARRACKS | 34. BOLLER |
| 5. BARRACKS | 35. BOLLER |
| 6. BARRACKS | 36. BOLLER |
| 7. BARRACKS | 37. BOLLER |
| 8. BARRACKS | 38. BOLLER |
| 9. BARRACKS | 39. BOLLER |
| 10. BARRACKS | 40. BOLLER |
| 11. BARRACKS | 41. BOLLER |
| 12. BARRACKS | 42. BOLLER |
| 13. BARRACKS | 43. BOLLER |
| 14. BARRACKS | 44. BOLLER |
| 15. BARRACKS | 45. BOLLER |
| 16. BARRACKS | 46. BOLLER |
| 17. BARRACKS | 47. BOLLER |
| 18. BARRACKS | 48. BOLLER |
| 19. BARRACKS | 49. BOLLER |
| 20. BARRACKS | 50. BOLLER |
| 21. BARRACKS | 51. BOLLER |
| 22. BARRACKS | 52. BOLLER |
| 23. BARRACKS | 53. BOLLER |
| 24. BARRACKS | 54. BOLLER |
| 25. BARRACKS | 55. BOLLER |
| 26. BARRACKS | 56. BOLLER |
| 27. BARRACKS | 57. BOLLER |
| 28. BARRACKS | 58. BOLLER |

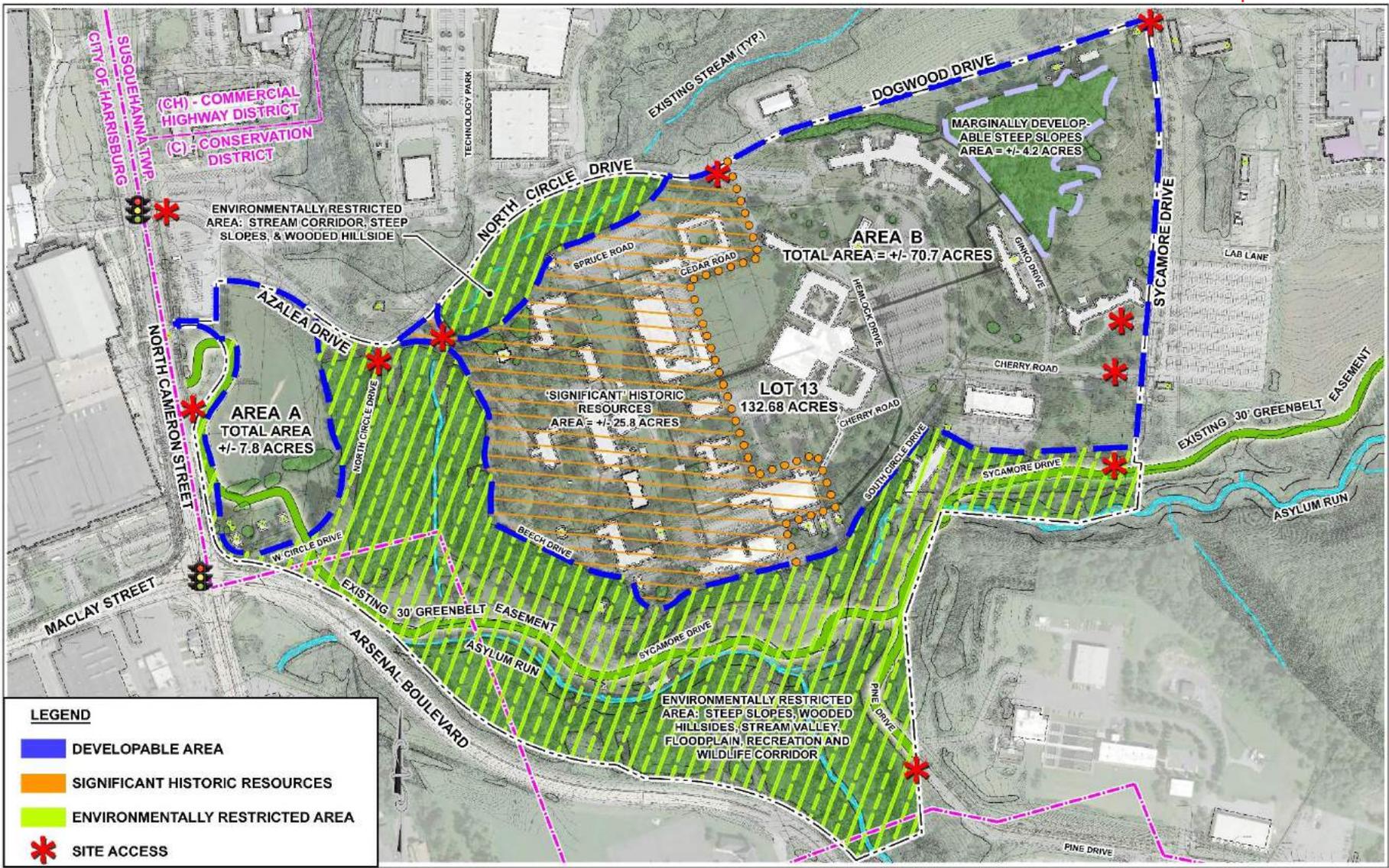
Lot 13 – Existing Conditions / Utilities

Information as of 7-26-16.
Final Information Pending
Release of Report.



Lot 13 – Developable Areas

Information as of 7-26-16.
Final Information Pending
Release of Report.



Lot 13 – Conclusions

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Total Lot Area = 132.68 acres

Developable Area A = 7.8 acres

- Farmhouse/Garage, 2 c.1930's residences
- Recreation Area
- Capital Area Greenbelt
- Potential development site with assurances of greenbelt connectedness

Developable Area B = 70.7 acres

- Harrisburg State Hospital Site - 45 buildings and significant infrastructure
- National Register Historic District
 - Significant Historic Resources Area = 25.8 acres of Developable Area B (36.5%)
 - 15 Significant / 2 Contributing / 3 Intrusions
 - Logical to protect some of the historical resources
- Marginally Developable Area = 4.2 acres

Environmentally Restricted Area = 54.2 acres

- Natural features, Capital Area Greenbelt, Patton Arboretum, floodplain, etc.
- Logical areas for protection and public use



Site Analysis – Lot 14 & 15

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Lot 14 & 15 - Site Features

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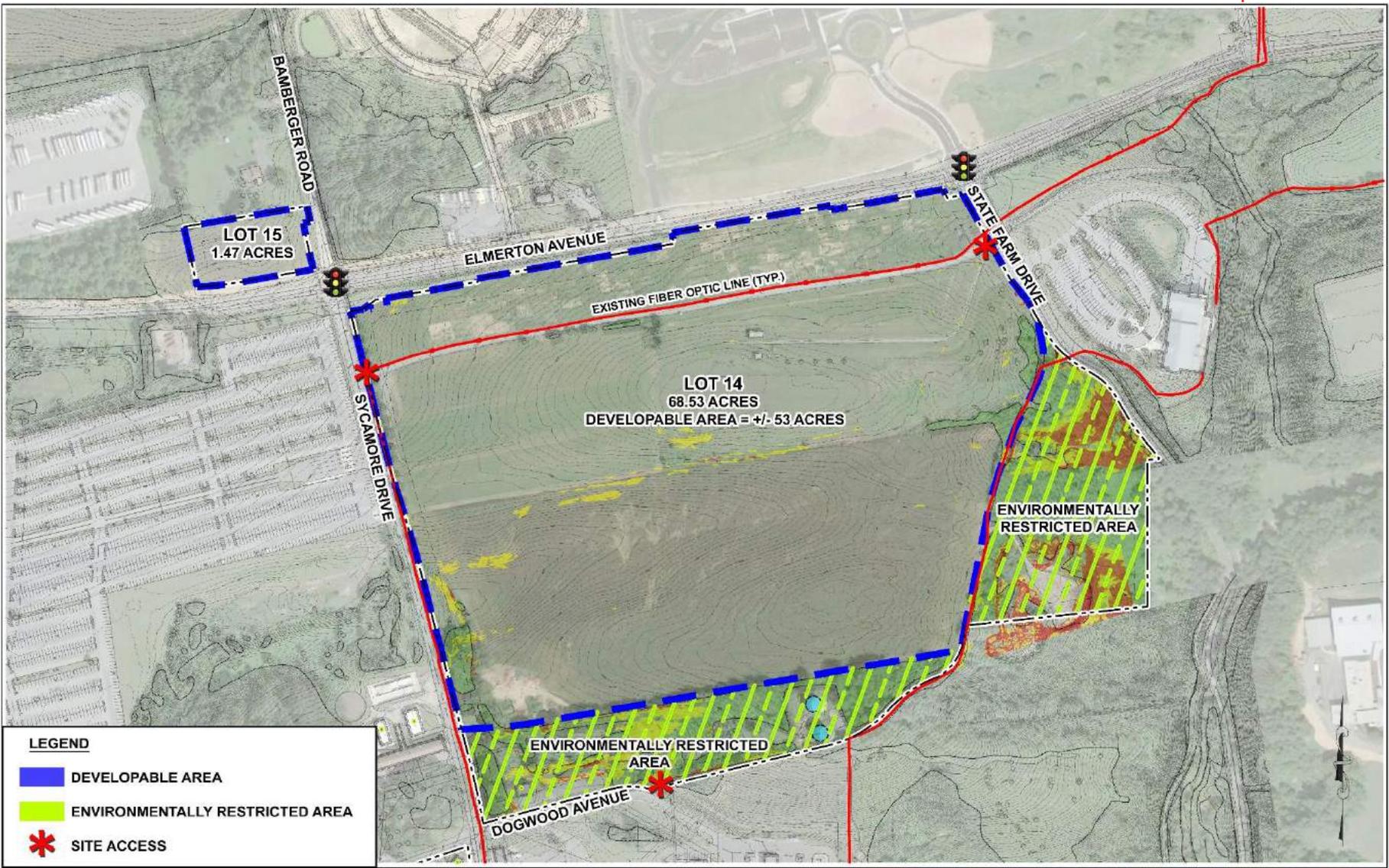


LEGEND

- BUILDING SETBACK
- ✳ EXISTING SITE ACCESS

Lot 14 & 15 – Developable Areas

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Final Information Pending
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Lot 14 & 15 – Conclusions

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Lot 14: Total Site Area = 68.53 Acres (C Zone)
Developable Area = 53 acres

- Dauphin County Public Garden Plots, Harrisburg Area Flying Society and agricultural lands
- Signalized intersections, frontage onto a major roadway, adjacent utilities
- Reasonably developable, used extensively by Dept. of Agriculture and general public

Environmentally Restricted Area = 15.5 Acres

- Steep slopes, wooded hillsides, and two areas of waste disposal
- Development unlikely

Lot 15: Total Site Area = 1.47 Acres (R-1 Zone)
Developable Area = 1.47 acres

- Agricultural land use
- Corner property, signalized intersection with frontage onto major roadway, adjacent utilities
- Logical development site

Environmentally Restricted Area = None

Site Analysis – Lot 16

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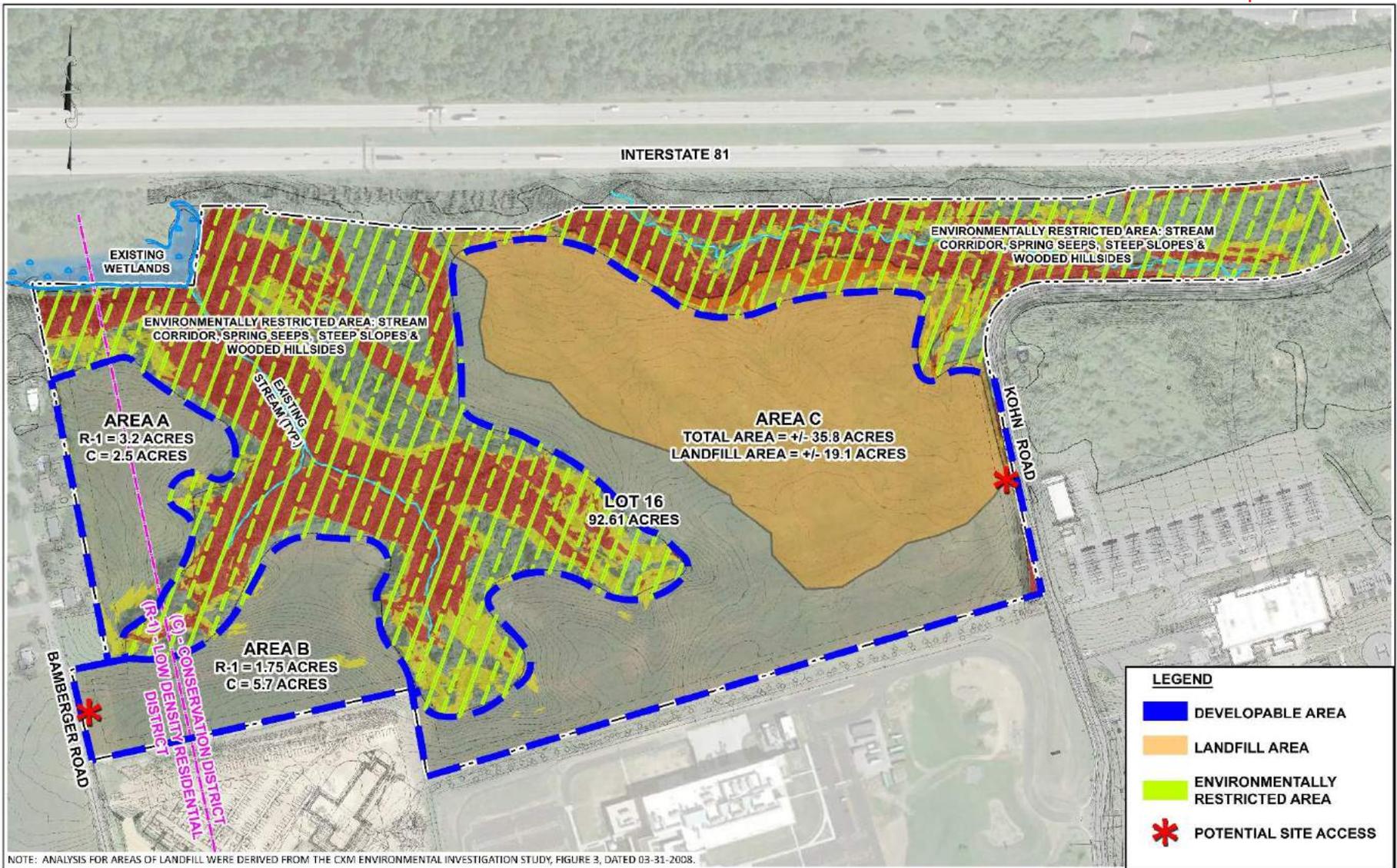
Lot 16 - Site Features

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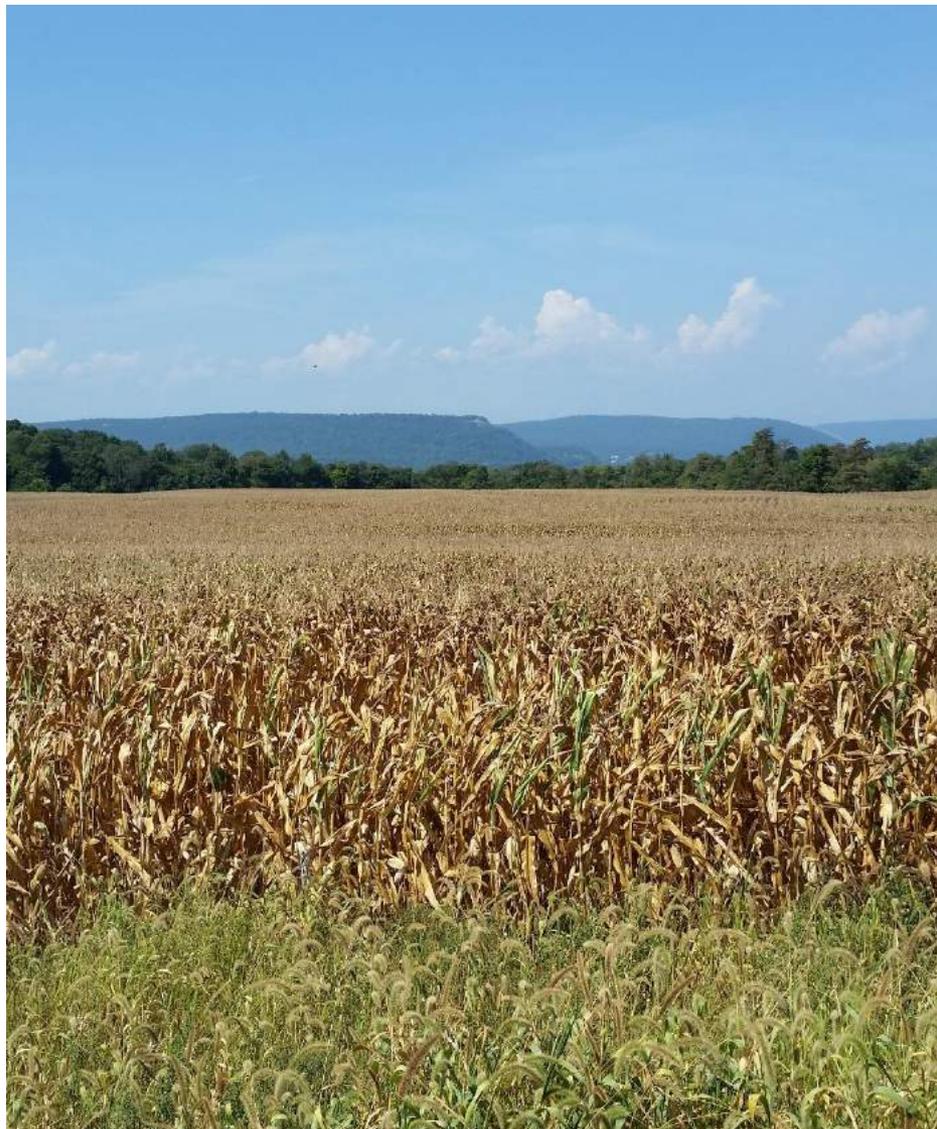
Lot 16 – Developable Areas

Information as of 7-26-16.
Final Information Pending
Release of Report.



Lot 16 – Conclusions

Information as of 7-26-16.
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Total Lot Area = 92.61 Acres

Developable Area A = 5.7 acres

- 3.2 Ac. R-1 / 2.5 Ac. C Zoning
- Adjacent residential homes, access, utilities
- Reasonable slopes but geometric constraints
- Limited development potential

Developable Area B = 7.5 acres

- 1.8 Ac. R-1 / 5.7 Ac. C Zoning
- Adjacent commercial building, access, utilities
- Topographic and geometric constraints
- Limited development potential

Developable Area C = 35.8 acres

- All C Zoning, open area, gentle slopes
- 22 acre landfill (19.1 acres in Area C)
- 16.7 acres of narrow lands outside footprint
- Kohn Road access requires sight distance evaluation
- Limited development potential, potential recreational / open space use

Environmentally Restricted Area = 49 acres

- Steep slopes, stream and wildlife corridors
- Over half (53%) of the total site area
- Development unlikely





Environmental Due Diligence

Steve Fulton, PE, PG

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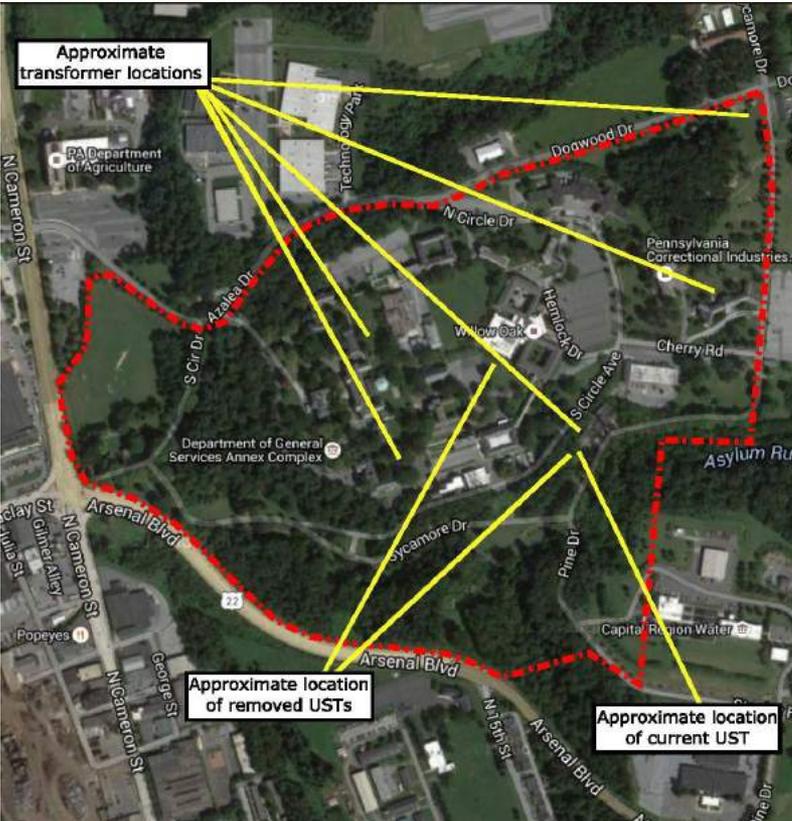


Scope of Work Conducted

- Phase I Environmental Site Assessments (ESAs) for four lots
 - Lot 13, Lot 14, Lot 15, Lot 16
- Phase I ESAs conducted per ASTM E-1527-13
 - Requested and reviewed available background documents
 - Requested and obtained user questionnaires
 - Requested and obtained environmental database searches
 - environmental databases, Sanborn maps, historic aerial photos, historic topo maps
 - Conducted site inspections
 - Completed and issued Draft Phase I ESA Reports

Lot 13 Summary

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General Conditions

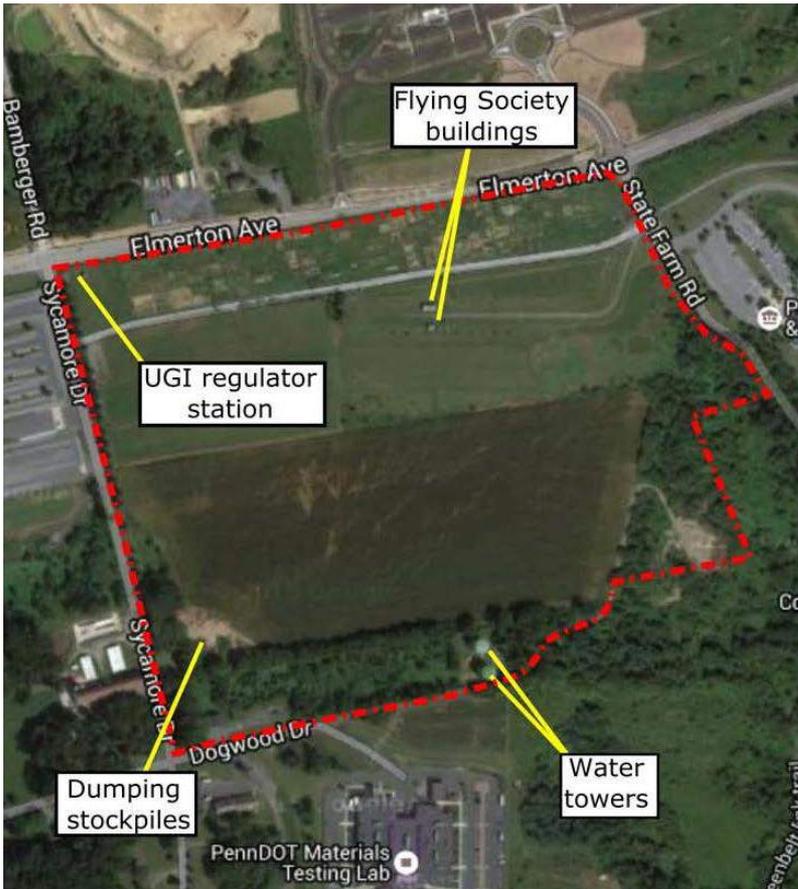
- 133-acre parcel, 44 building improvements
- Former Harrisburg State Hospital
- 2 paint shops and maintenance building from late 1800s
- 5,000-gallon petroleum UST
- Two 2,000-gallon ASTs (diesel and gasoline)
- Radon potential (EPA Zone 1)

Summary of Findings

- No RECs, HRECs, or CRECs
- UST, ASTs, & radon considered to be BERs

Lot 14 Summary

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General Conditions

- 68-acre parcel, managed by PA Department of Agriculture
- 4 building improvements
- 2 open-air buildings used by Harrisburg Area Flying Society
- Water well
- UGI Regulator
- Two large water tanks managed by DGS
- Radon potential (EPA Zone 1)

Summary of Findings

- No RECs, HRECs, or CRECs
- Debris/waste piles considered to be BERs



Lot 15 Summary

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General Conditions

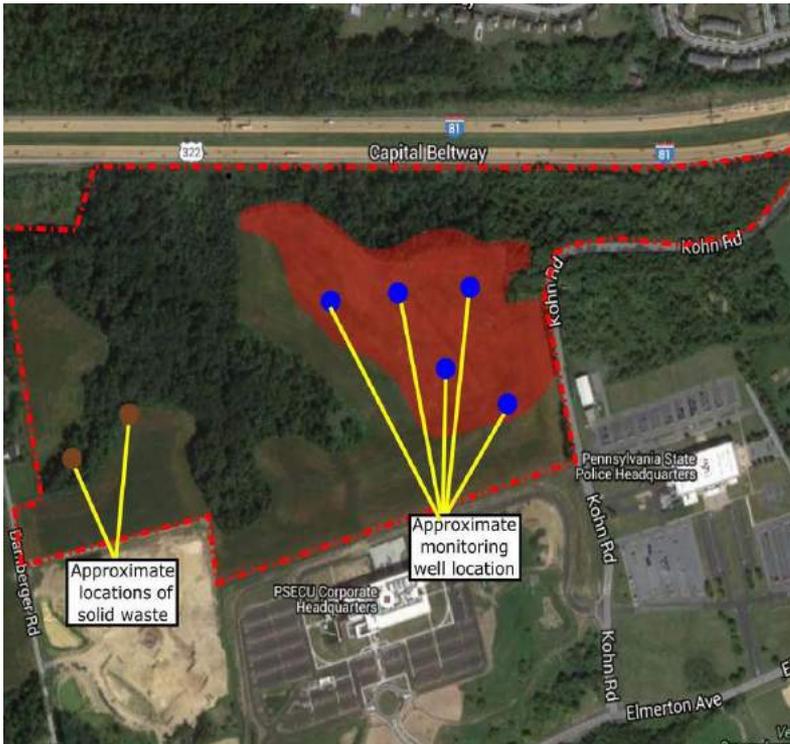
- 1.5-acre parcel, managed by PA Department of Agriculture
- No building improvements
- Radon potential (EPA Zone 1)

Summary of Findings

- No RECs, HRECs, CRECs, or BERs

Lot 16 Summary

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General Conditions

- 93-acre parcel, no improvements
- 22-Acre Unpermitted Municipal Solid Waste Landfill
 - operated between ~1960 to 1972
 - investigated in 2008
 - waste up to 60 feet deep
 - some contaminants in groundwater and seeps
- Tires and surface debris piles
- Possible on-site wetlands
- Radon potential (EPA Zone 1)

Summary of Findings

- No HRECs, or CRECs
- 22-acre solid waste landfill is a REC
- Surface debris, wetlands, and radon considered to be BERs

Scope of Work Conducted

Asbestos Survey for Lot 13 Buildings/Structures

- Also completed Limited Lead-Based Paint (LBP) Survey

Compilation and Review of Existing Information

- Discussions with site personnel
- Detailed file review of maps and documents
- Obtained copies of relevant reports:
- 1990 Asbestos Inspection and Planning Reports (LRK)
- 2005 Biennial Building Survey Report
- Asbestos abatement reports

Completed Detailed Building Inspections

- PA-licensed asbestos inspectors
- Inspected and samples accessible locations (buildings, tunnels)
- Confirmed locations and quantities of existing ACMs
- Focused sampling on suspect materials and unknowns
 - Submitted 140 samples for analysis
 - Didn't resample known asbestos
- Limited sampling of paint chip samples for lead

Summary of Findings

- Asbestos present in most of the buildings and tunnels
- LBP present in most of the buildings (26/28 samples positive)



Real Estate Market Analysis

Todd Poole

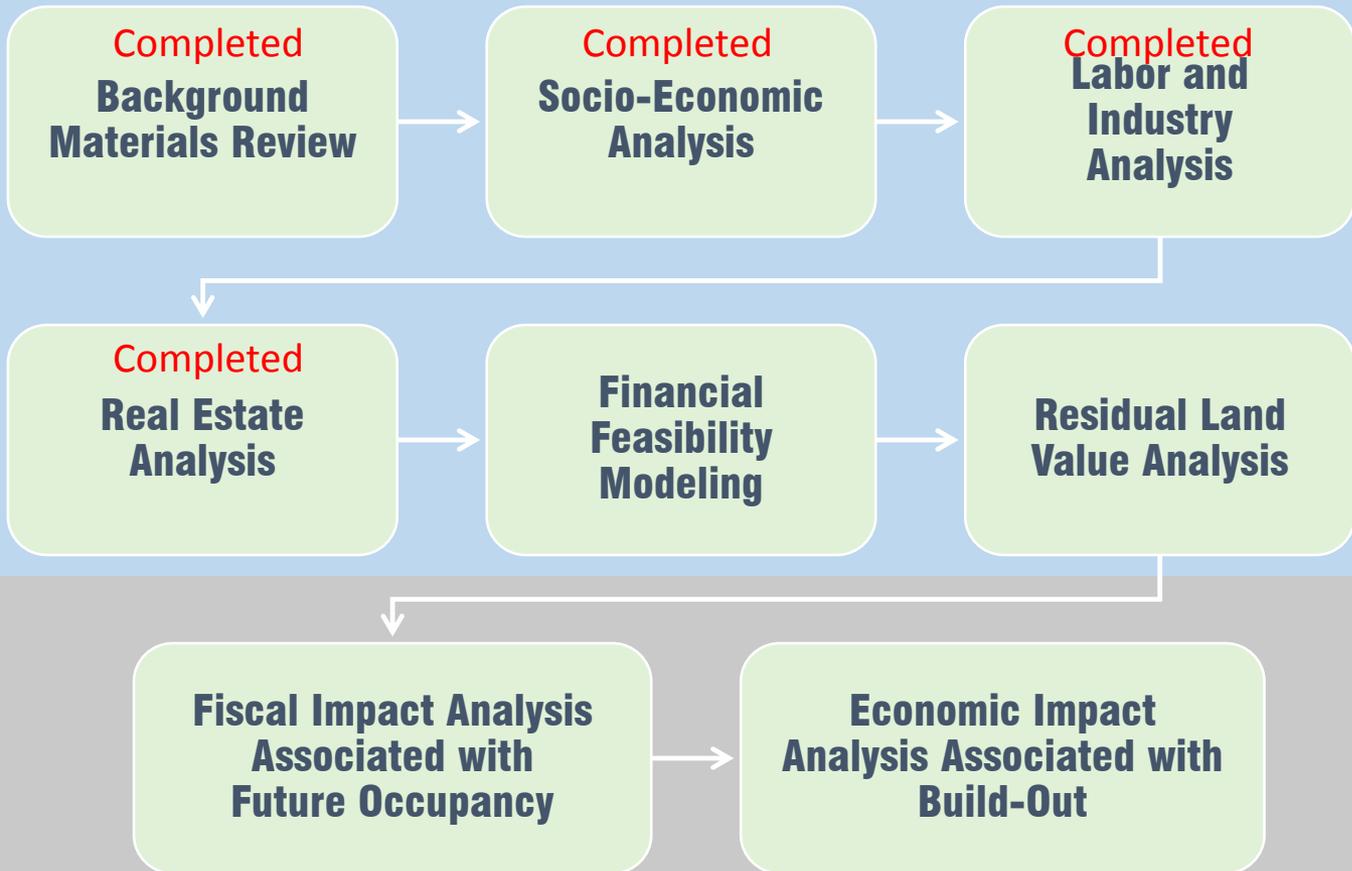
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Market, Fiscal, and Economic Impact Analysis

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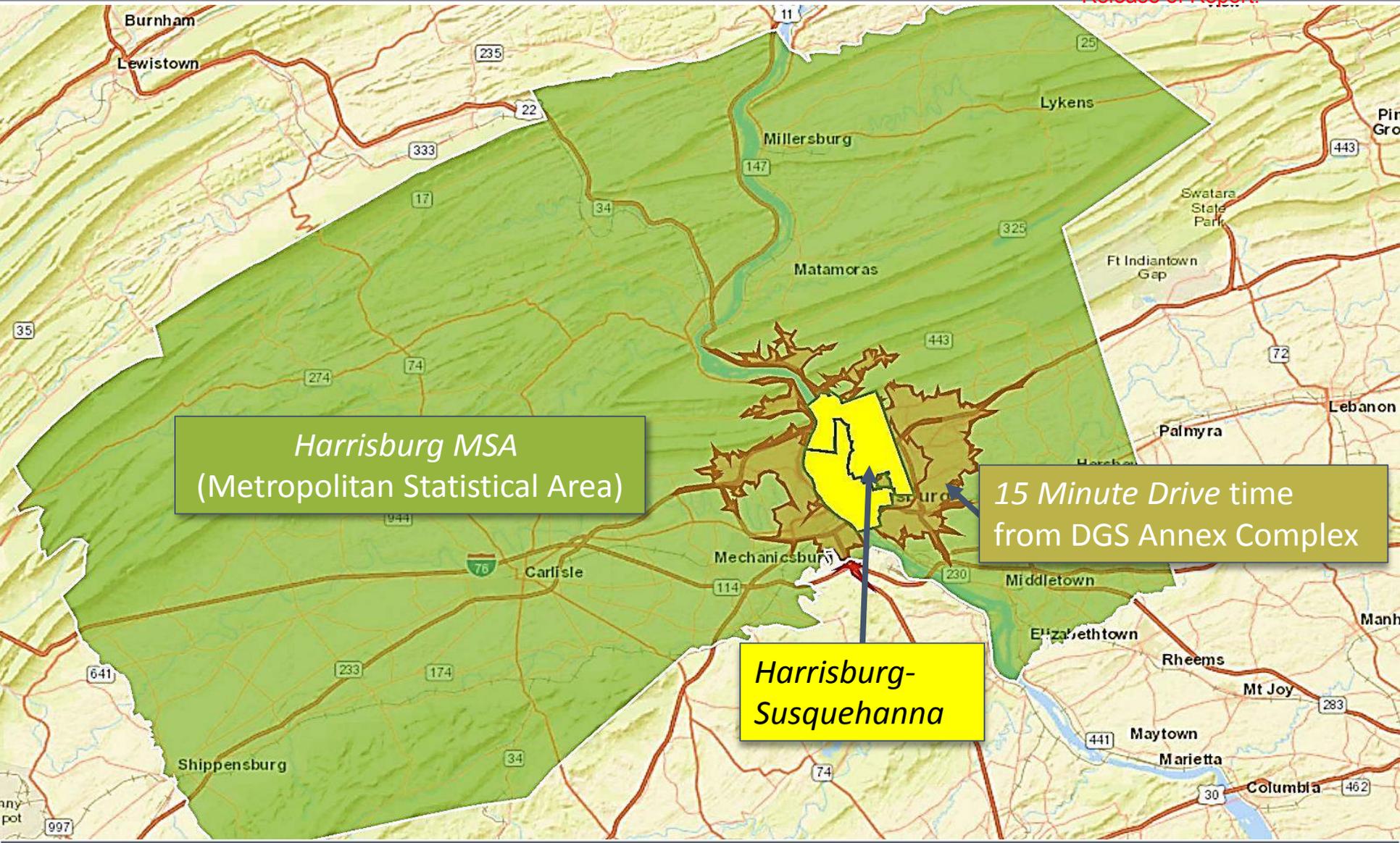
Phase I: Market Analysis



Phase II: Fiscal and Economic Impact Analyses

Market Study Areas

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Key Metrics: Socio-Economic, Labor and Industry

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| | Harrisburg-Susquehanna | 15-Minute Drive-Time Contour | Harrisburg MSA | |
|--|---|------------------------------|-----------------------|-----------------------------------|
|  <p>Socio-Economic</p> | Total Population (2015) | 74,601 | 77,915 | 564,979 |
| | Student Population (18-24) | 9.9% | 9.7% | 2.9% |
| | Elderly Population (65+) | 13.5% | 13.8% | 16.7% |
| | Forecasted Annualized Population Growth (2015-2020) | 0.29% | 0.14% | 0.58% |
| | Total Households (2015) | 31,973 | 34,176 | 230,049 |
| | Median Age (2015) | 37 | 37 | 41 |
| | Median Household Income (2015) | \$38,984 | \$41,602 | \$56,915 |
| | Workforce Population (18-64) | 63.1% | 64.5% | 55.6% |
|  <p>Labor and Industry</p> | Total Employment (2014) | 69,224 | 162,209 | 307,563 |
| | Top Industry by Employment (2014) | Public Administration | Public Administration | Health Care and Social Assistance |
| | Unemployment Rate (2016) | 6.6% | 6.6% | 3.2% |



Key Metrics: Real Estate

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Harrisburg MSA



Multi-Family

| | |
|--------------------------------|------------------------|
| Under Constr. (number): | 30 projects |
| Under Constr. (value): | \$154.0 million |
| Vacancy Rate: | 3.5 percent |
| Average Lease Rate: | \$857 per month |



Office

| | |
|-------------------------------------|------------------------|
| Under Construction (number): | 33 projects |
| Under Construction (value): | \$133.4 million |
| Vacancy Rate: | 17.9 percent |
| Average Lease Rate: | \$16.42 NNN |



Retail

| | |
|-------------------------------------|------------------------|
| Under Construction (number): | 55 projects |
| Under Construction (value): | \$219.4 million |
| Vacancy Rate: | 13.5 percent |
| Average Lease Rate: | \$14.52 NNN |



Lodging

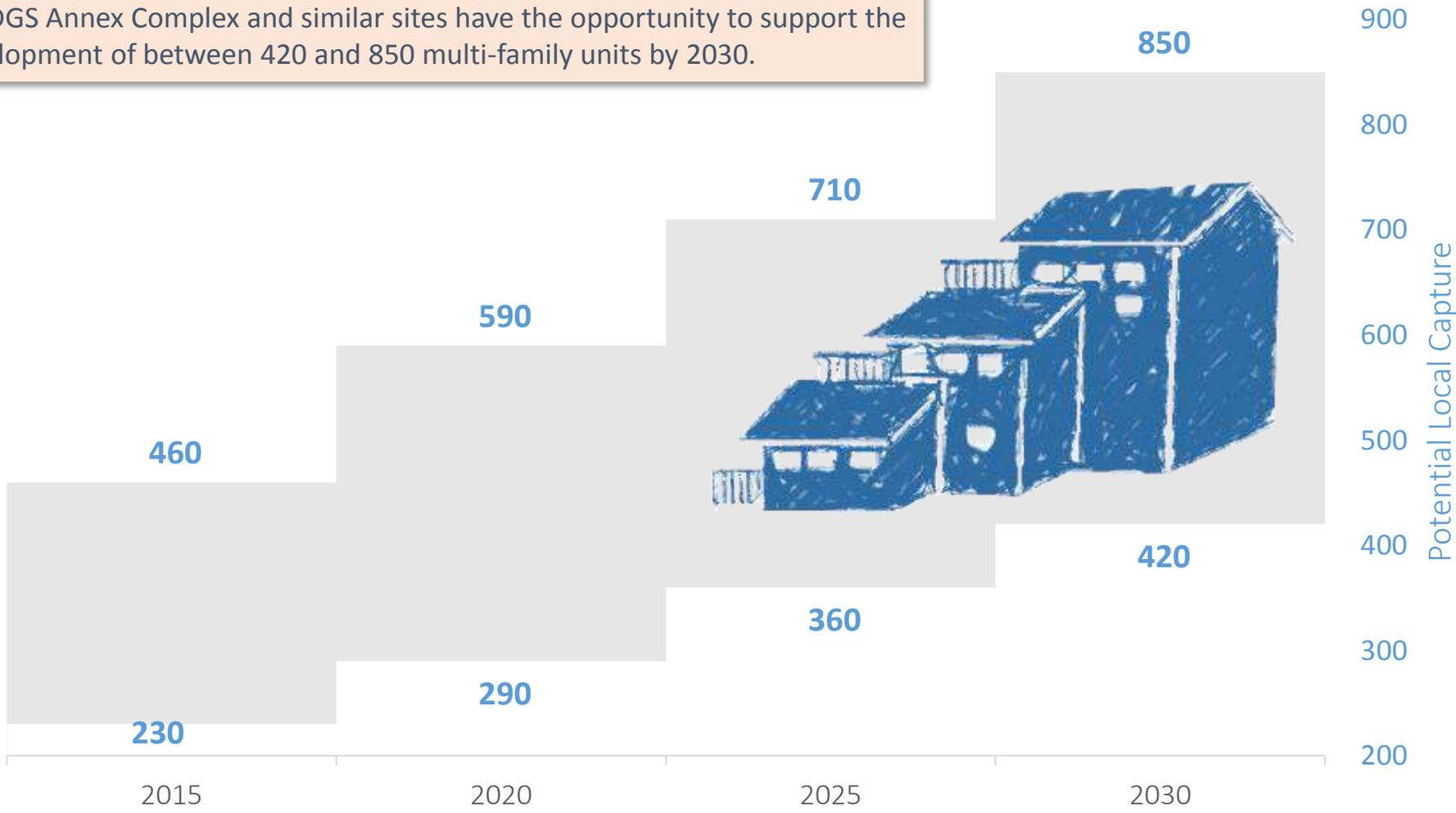
| | |
|--------------------------------|-----------------------|
| Under Constr. (number): | 11 projects |
| Under Constr. (value): | \$16.0 million |

Source: Reis, Q1 2015, Construction Market Data Group LLC, 4ward Planning, Inc., 2016

Projected Residential Demand

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Assuming between 10- and 20-percent of net housing demand within Harrisburg-Susquehanna would be captured, and based on current trends, the DGS Annex Complex and similar sites have the opportunity to support the development of between 420 and 850 multi-family units by 2030.

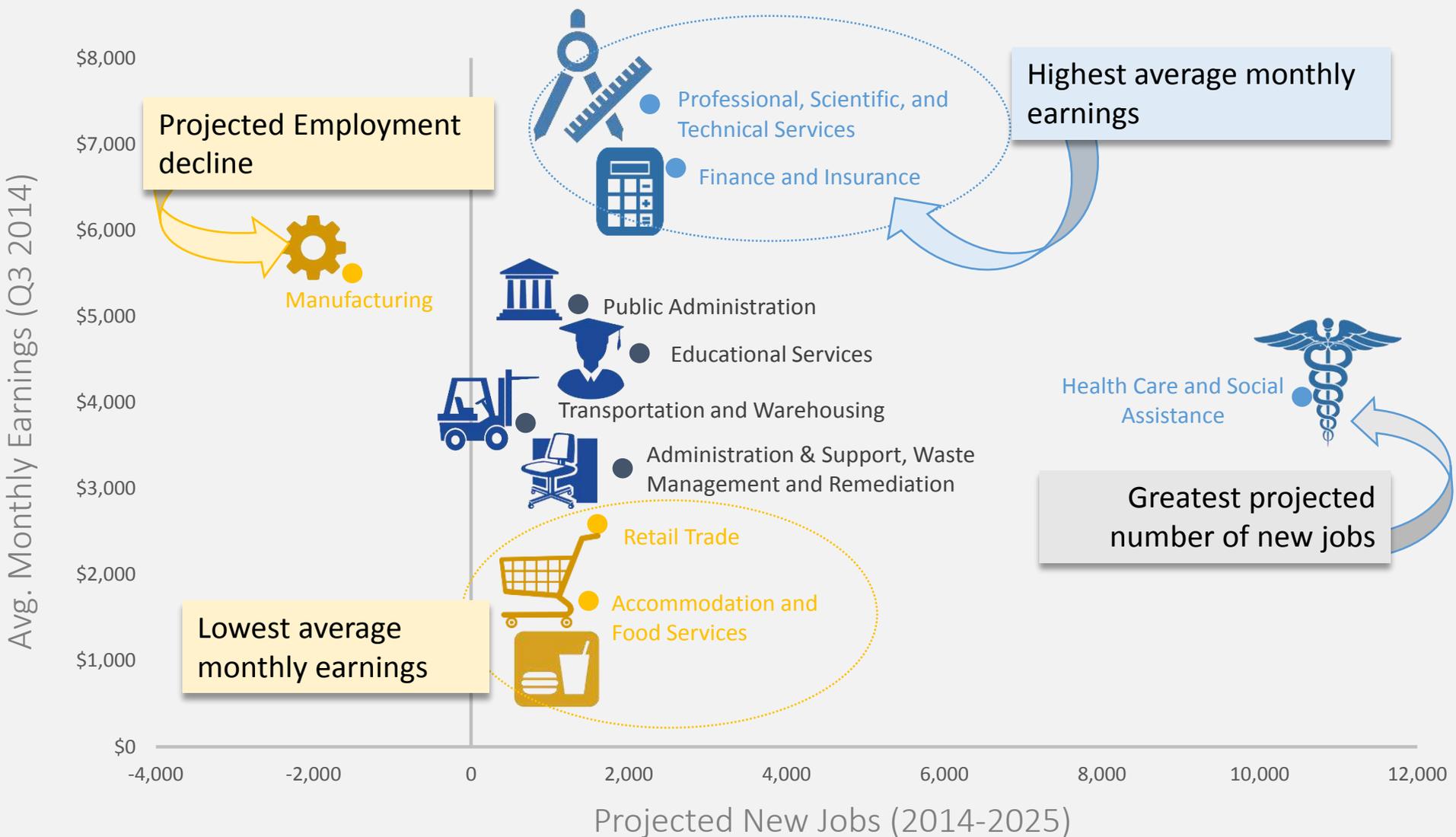


Source: US Census Bureau;
On The Map; 4ward Planning Inc. 2016



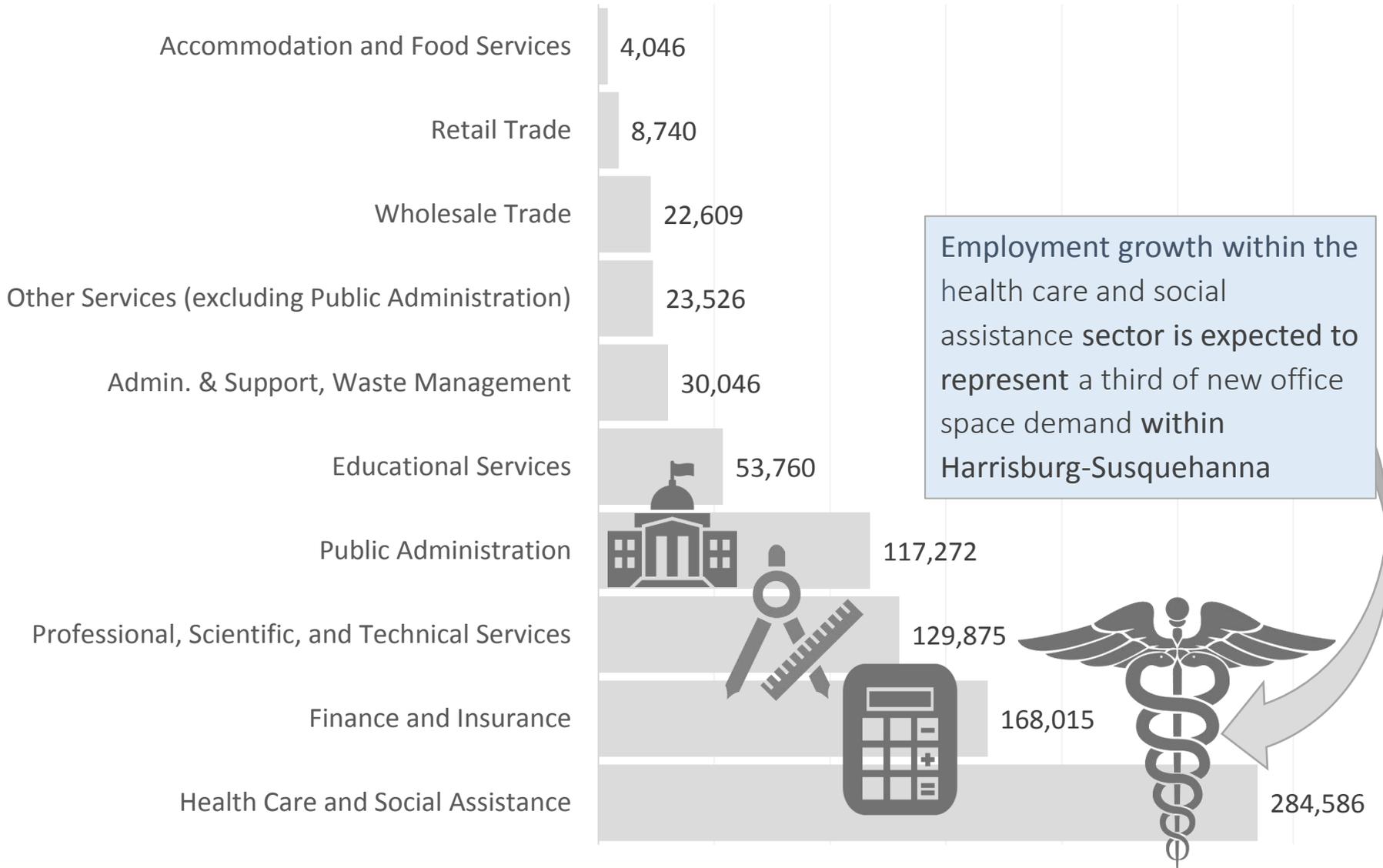
Industry Earnings and Growth: Harrisburg MSA

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Projected Net New Office Demand (SF)

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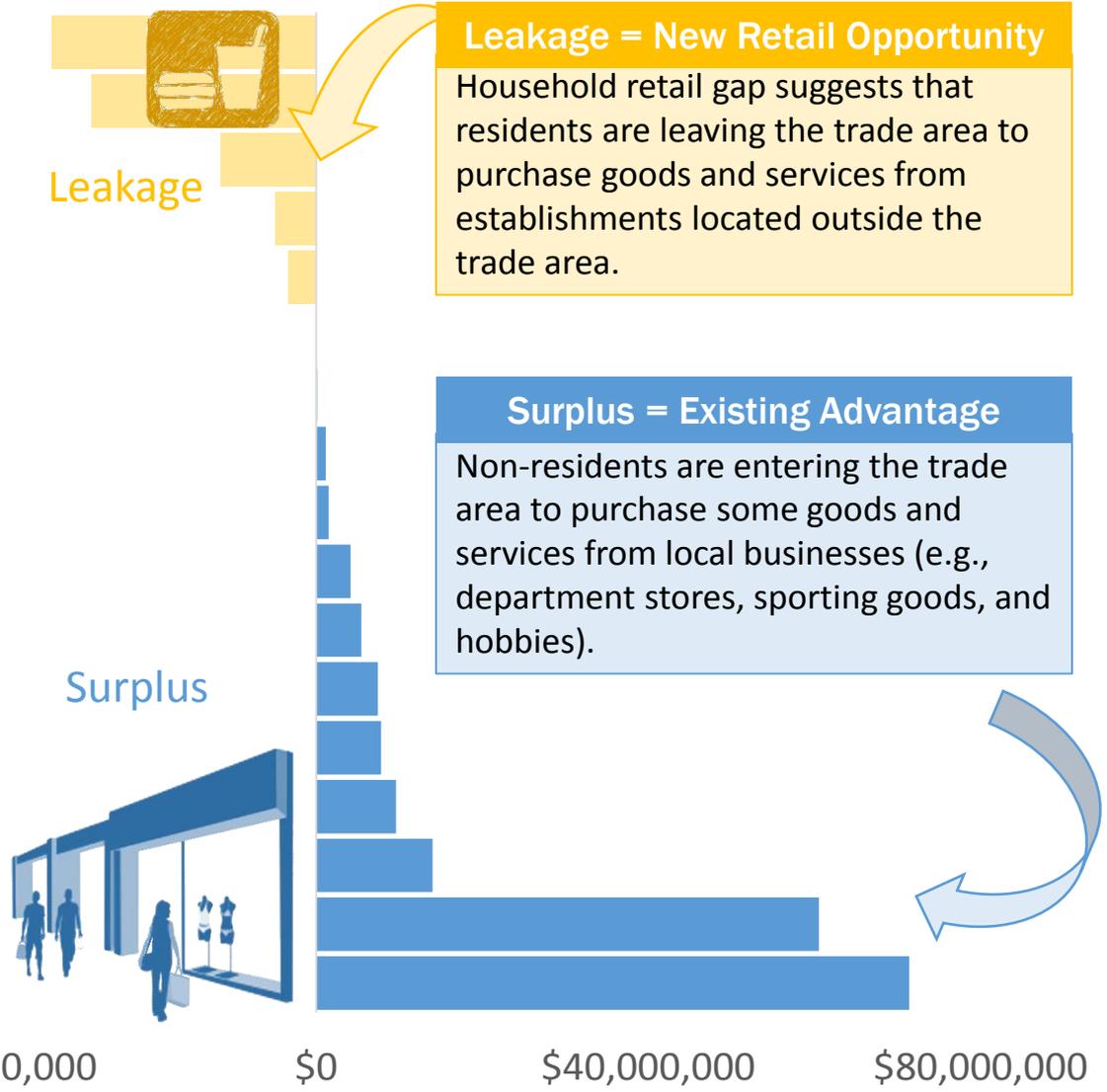


Source: 4ward Planning, Inc., 2016

Household Retail Gap: Harrisburg-Susquehanna

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- Food Services & Drinking Places
 - Full-Service Restaurants
- Health & Personal Care Stores
- Electronics & Appliance Stores
- Drinking Places - Alcoholic Beverages
- Office Supplies, Stationery & Gift Stores
- Furniture Stores
- Beer, Wine & Liquor Stores
- Home Furnishings Stores
- Food & Beverage Stores
- Grocery Stores
- Clothing Stores
- Sporting Goods/Hobby/Musical Instr Stores
- Sporting Goods, Hobby, Book & Music Stores
- Bldg Material & Supplies Dealers
- Department Stores Excluding Leased Depts.
- General Merchandise Stores



PA Farm Show Complex & Expo Center

Information as of 7-26-16.
Final Information Pending
Release of Report.

Theme
87% of events are related have an Agriculture or Outdoors theme

Est. Dates
75% of total attendance occurs in January and February

| Event | Theme | Est. Dates | Days | Est. Attendance |
|--|---------------|-------------|------------|-----------------|
| Annual Pennsylvania Farm Show | Agriculture | Mid Jan | 7 | 500,000 |
| Great American Outdoor Show | Outdoors | Mid Feb | 9 | 200,000 |
| PA Garden Expo | Home & Garden | Feb/March | 3 | 17,000 |
| PA Home Show | Home & Garden | Feb/March | 4 | 10,000 |
| Horse World | Agriculture | Early March | 6 | 20,000 |
| PA Home Builders Show | Home & Garden | Mid March | 3 | 20,000 |
| PA Junior Wrestling Championships | Sports | Mid March | 2 | 15,000 |
| U.S. Junior National Hershey Showcase: Girls Basketball To | Sports | Late June | 4 | 3,000 |
| Fire Expo | Professional | Mid May | 6 | 20,000 |
| Keystone State Summer Games | Sports | Late June | 4 | 6,000 |
| Mennonite World Conference | Religion | Late July | 6 | 8,000 |
| MotorRama | Automobile | Mid Feb | 2 | 25,000 |
| All-American Dairy Show | Agriculture | Mid Sept | 6 | 6,000 |
| Keystone International Livestock Exposition | Agriculture | Sept/Oct | 10 | 15,000 |
| Penn National Horse Show | Agriculture | Mid Oct | 11 | 15,000 |
| American Rabbit Breeders Association | Agriculture | Mid Oct | 4 | 7,500 |
| PA State 4-H Horse Show | Agriculture | Late Oct | 3 | 5,000 |
| Standardbred Horse Sale | Agriculture | Early Nov | 6 | 15,000 |
| PA Christmas Show | Holiday | Early Dec | 4 | 30,000 |
| Total | | | 100 | 937,500 |



Est. Attendance
937,500 annual participants from 19 largest events

Source: Pennsylvania Farm Show Complex and Expo Center; Hershey Harrisburg Regional Visitors Bureau

Employment Centers, 2014

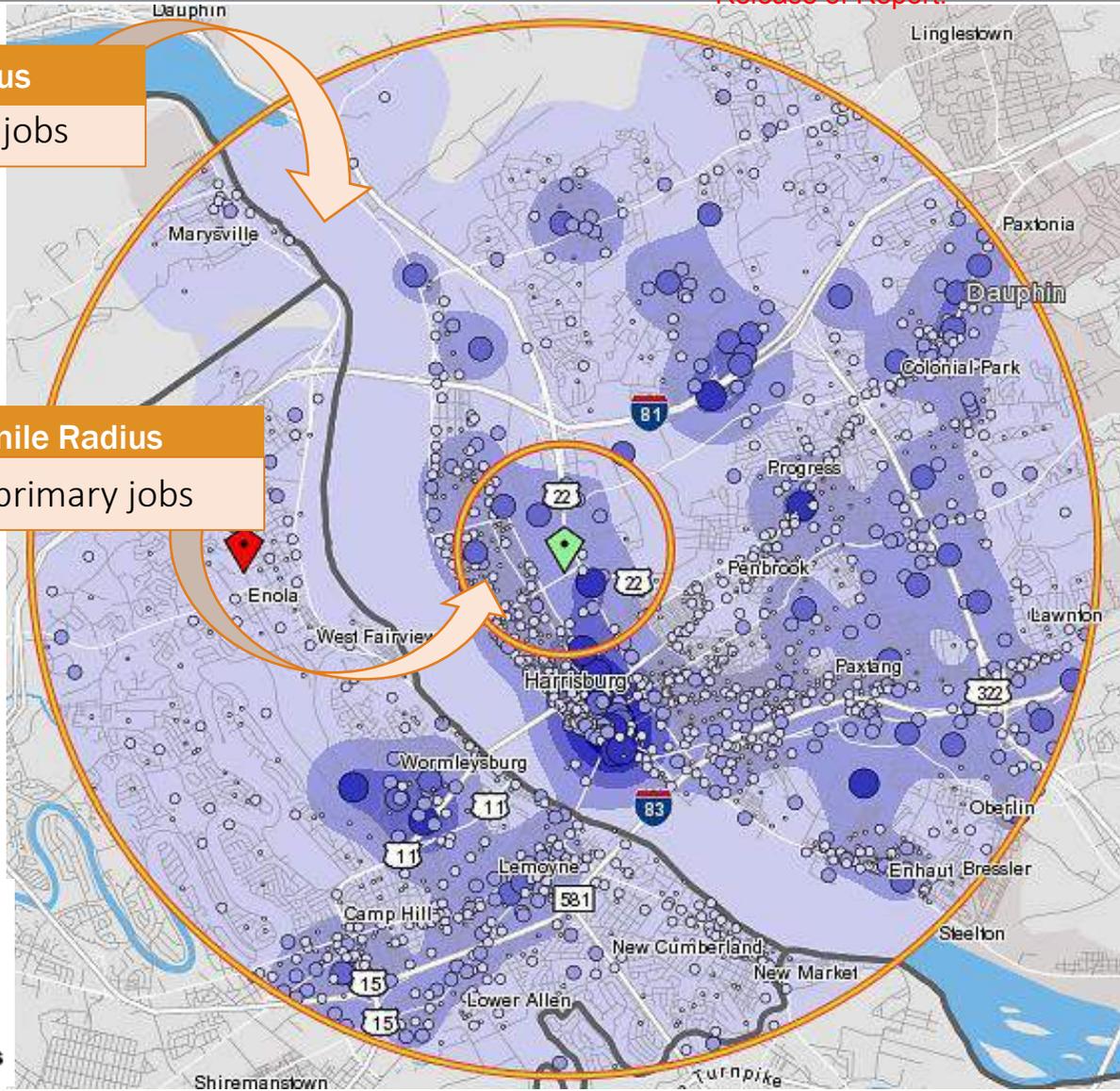
Information as of 7-26-16.
Final Information Pending
Release of Report.

Identifying employment clusters can help predict unmet services demand



5-mile Radius
133,000 primary jobs

1-mile Radius
11,200 primary jobs



- | | |
|------------------------------|----------------------|
| 5 - 1,717 Jobs/Sq.Mile | • 1 - 13 Jobs |
| 1,718 - 6,853 Jobs/Sq.Mile | ○ 14 - 195 Jobs |
| 6,854 - 15,414 Jobs/Sq.Mile | ● 196 - 984 Jobs |
| 15,415 - 27,398 Jobs/Sq.Mile | ● 985 - 3,109 Jobs |
| 27,399 - 42,808 Jobs/Sq.Mile | ● 3,110 - 7,589 Jobs |

Source: OnTheMap, 4ward Planning Inc., March 2016.

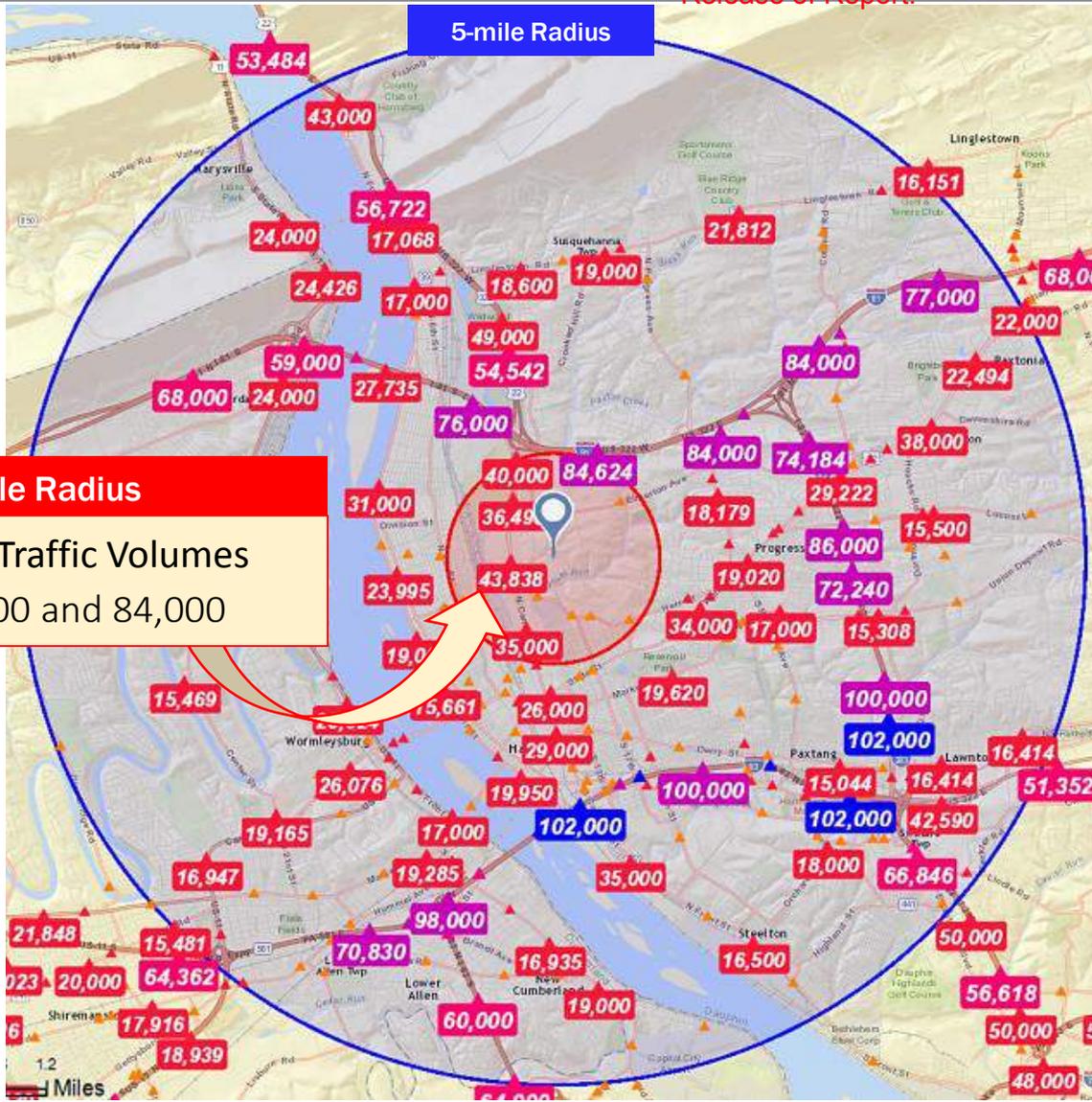
Average Daily Traffic Volumes

Information as of 7-26-16.
Final Information Pending
Release of Report.

High levels of traffic can drive significant "walk-in" and leisure traveler business.



1-mile Radius
Average Daily Traffic Volumes
between 35,000 and 84,000



- Average Daily Traffic Volume**
- ▲ Up to 6,000 vehicles per day
 - ▲ 6,001 - 15,000
 - ▲ 15,001 - 30,000
 - ▲ 30,001 - 50,000
 - ▲ 50,001 - 100,000
 - ▲ More than 100,000 per day

Source: Esri, 4ward Planning Inc., March 2016.

Lodging Inventory & Pipeline

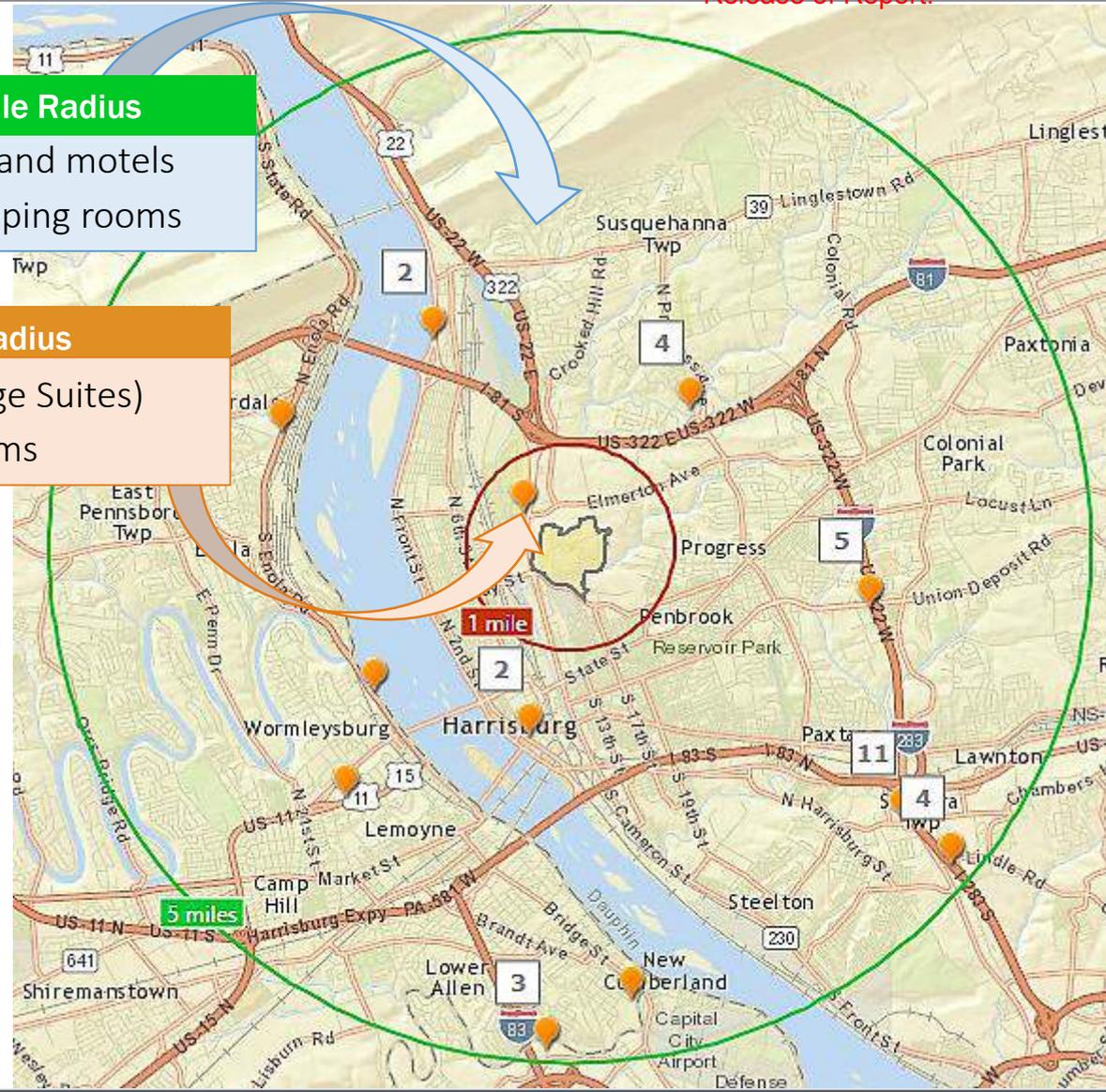
Information as of 7-26-16.
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5-mile Radius
36 hotels and motels
4,540 sleeping rooms

1-mile Radius
1 hotel (Staybridge Suites)
127 sleeping rooms

There are currently 11 hotel projects (1,183 rooms) currently in development within the Harrisburg MSA, but no pipeline hotel projects within the 5-mile radius.



Source: STR, Inc., Cvent, 4ward Planning Inc., March 2016.

Key Findings & Takeaways

Information as of 7-26-16.
Final Information Pending
Release of Report.

| Socio-Economic | | | Labor and Industry | | | Real Estate | | |
|--|--|---|---|---|--|---------------------------------|--|--|
| Population/ Households | Household Formation Dominated by Non-Family Households |  | Top Industry By Share of Employment | Currently Public Administration But Declining |  | Multi-Family Residential | Support 420 to 850 Apartments |  |
| Age Distribution | Growth in Baby Boomers and Empty Nesters |  | Industry by Average Monthly Earnings | Lowest Earnings in Retail Trade, Accommodations, and Food Sector |   | Commercial Office | New Regional Demand for Medical Office |  |
| Household Income & Spending | Higher Regional Purchasing Power |  | | Highest Earnings in Professional, Scientific & Technical Services |  | | | |
| Housing Tenure | Higher Local Share of Renter-Occupied Households |  | MSA Employment Change (2011-2015) | Decline in Manufacturing Jobs |  | Regional Attractions | Leverage Annual Event Participants |  |
| Housing Vacancy | Higher Housing Vacancy than MSA |  | | 10,000 new Health Care & Social Services Jobs |  | | | |





Questions & Answers

6.0

Guidelines for Engagement

1. Priority will be given to the general public. Stakeholders may comment after all general public participants have been heard.
2. Written comments will be accepted. Comment cards are available at the registration table and will be collected afterward.
3. Commentary should be limited to three (3) minutes so everyone can be heard.
4. Speak slowly and clearly; comments are being documented for inclusion in the final disposition report.
5. State your name, where you live and stakeholder group affiliation (if applicable). *Note whether you have previously been engaged in providing input or feedback.*

