



LANCASTER EAST END SMALL AREA PLAN EXISTING CONDITIONS BRIEF

JUNE 26TH 2025
EXISTING CONDITIONS REPORT



DEMOGRAPHICS OVERVIEW





LEGEND

- ★ Lancaster County Prison
- City of Lancaster
- Parks
- Railroad
- - - Primary Study Area
- Cemetery
- - - Secondary Study Area
- Water

EXISTING CONDITIONS REPORT

DATA SOURCE: CITY OF LANCASTER, PASDA, ESRI ACS (2018-2022), U.S. CENSUS BUREAU

5,794
POPULATION

37.9% WHITE

29.9% BLACK OR AFRICAN AMERICAN

28.1% HISPANIC OR LATINO

1.2% ASIAN

1,954
HOUSEHOLDS

33.6
MEDIAN AGE

31.1%
SPEAK A LANGUAGE OTHER THAN ENGLISH

\$54,876
MEDIAN HOUSEHOLD INCOME

2.6%
UNEMPLOYMENT RATE

PSA

15,280
POPULATION

28.4% WHITE

22.5% BLACK OR AFRICAN AMERICAN

46.0% HISPANIC OR LATINO

1.2% ASIAN

4,906
HOUSEHOLDS

33.1
MEDIAN AGE

38.8%
SPEAK A LANGUAGE OTHER THAN ENGLISH

\$53,075
MEDIAN HOUSEHOLD INCOME

4.1%
UNEMPLOYMENT RATE

SSA

57,970
POPULATION

51.5% WHITE

17.4% BLACK OR AFRICAN AMERICAN

39.4% HISPANIC OR LATINO

2.7% ASIAN

21,234
HOUSEHOLDS

33.9
MEDIAN AGE

32.1%
SPEAK A LANGUAGE OTHER THAN ENGLISH

\$61,014
MEDIAN HOUSEHOLD INCOME

3.7%
UNEMPLOYMENT RATE

CITY

PSA

1,954
HOUSEHOLDS

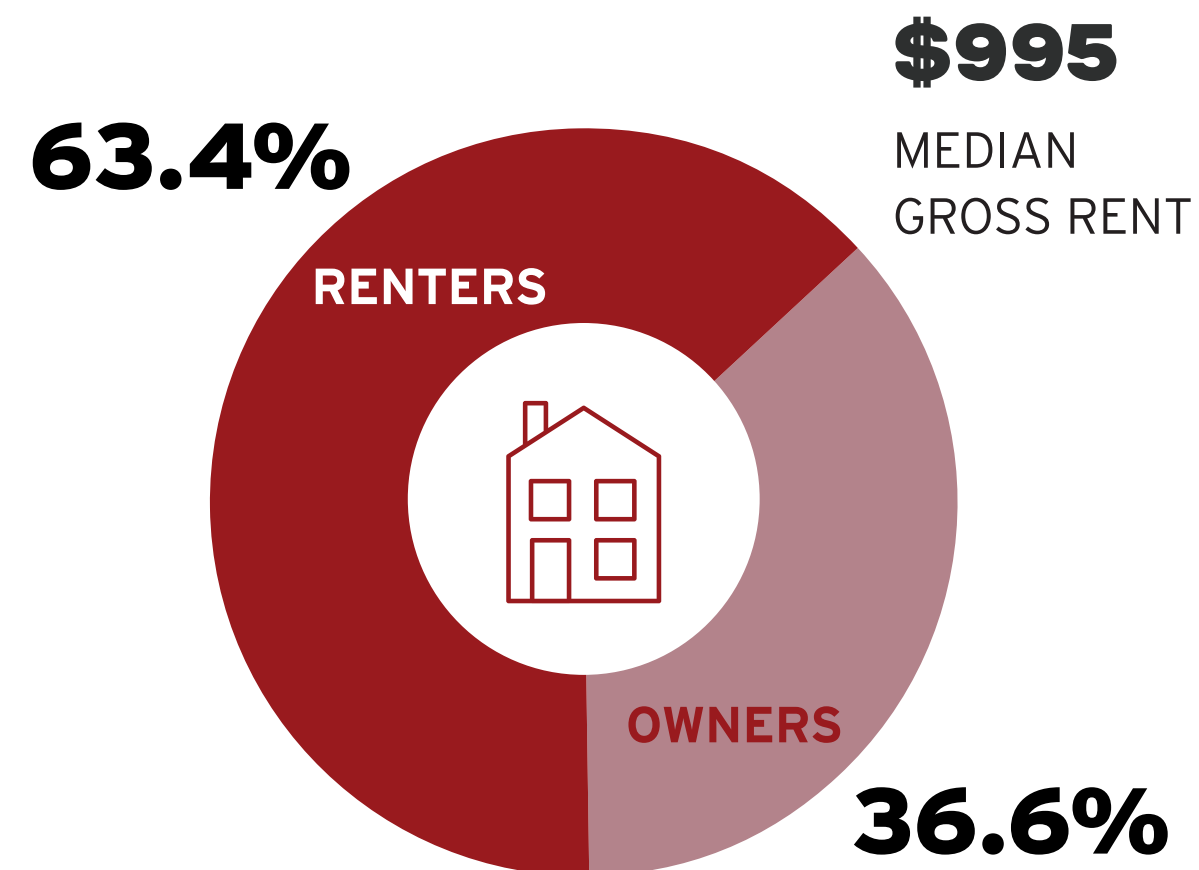
\$ 167,857
MEDIAN HOME VALUE

2.57
AVERAGE HH SIZE

30.8%
OF RENTER HOUSEHOLDS
ARE COST-BURDEN

1940
MEDIAN YEAR
STRUCTURE BUILT

\$54,876
MEDIAN HOUSEHOLD
INCOME



SSA

5,392
HOUSEHOLDS

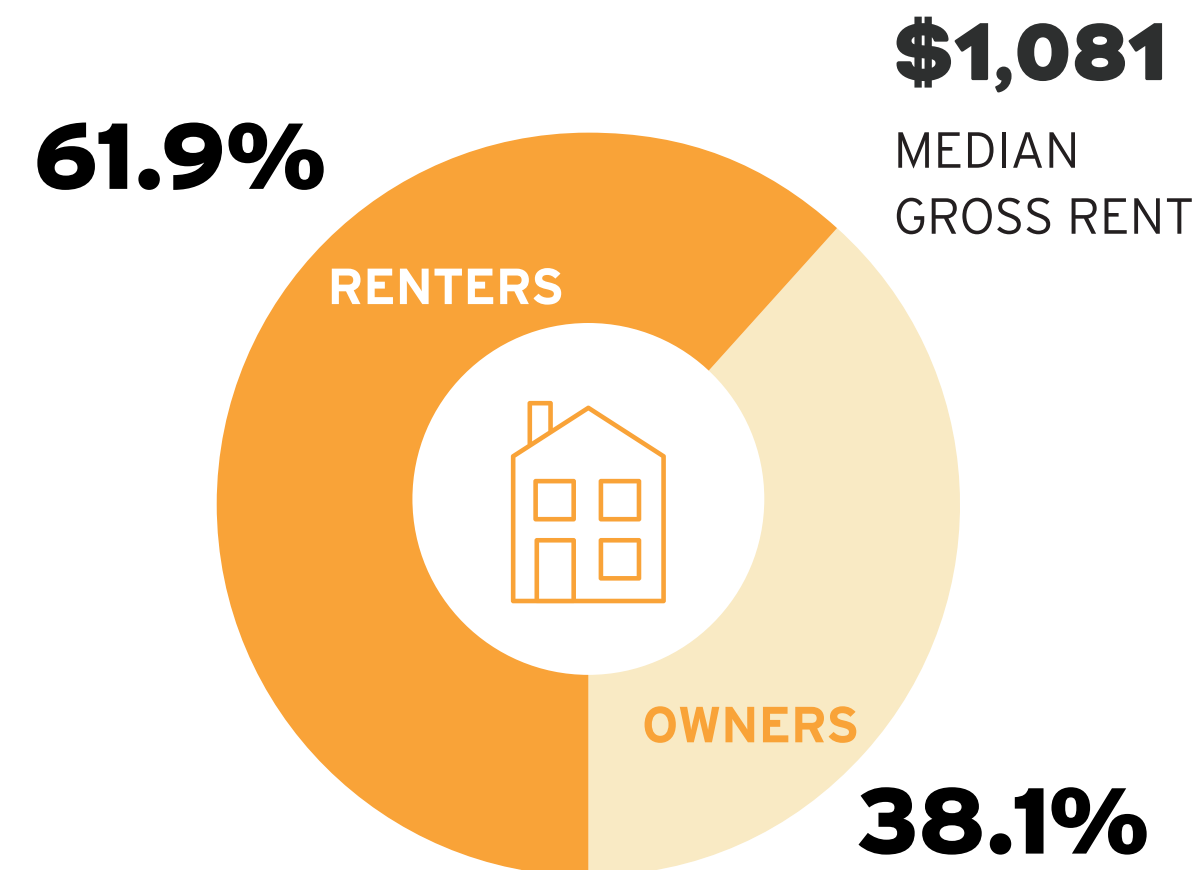
\$ 165,183
MEDIAN HOME VALUE

2.66
AVERAGE HH SIZE

42.0%
OF RENTER HOUSEHOLDS
ARE COST-BURDEN

1940
MEDIAN YEAR
STRUCTURE BUILT

\$53,075
MEDIAN HOUSEHOLD
INCOME



CITY

21,234
HOUSEHOLDS

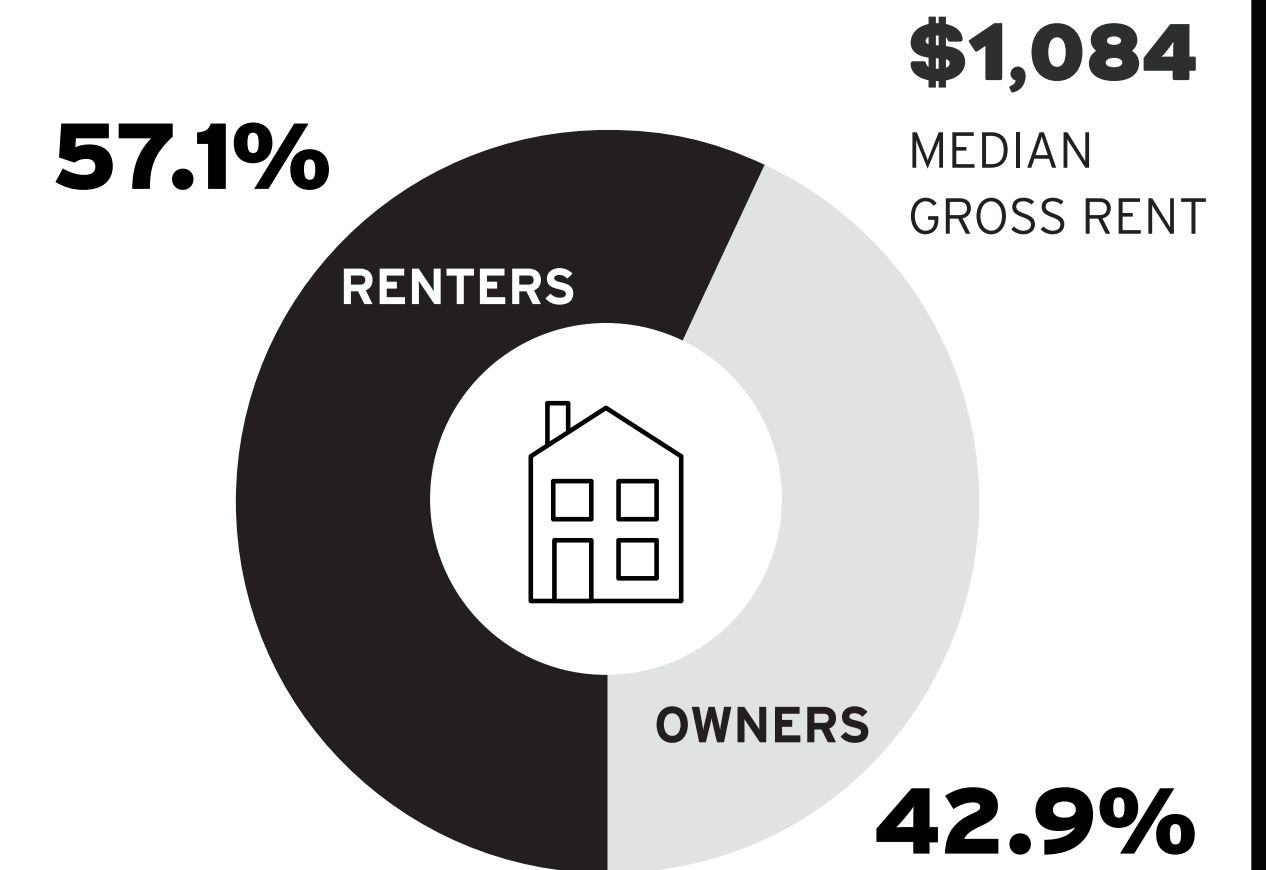
\$ 209,435
MEDIAN HOME VALUE

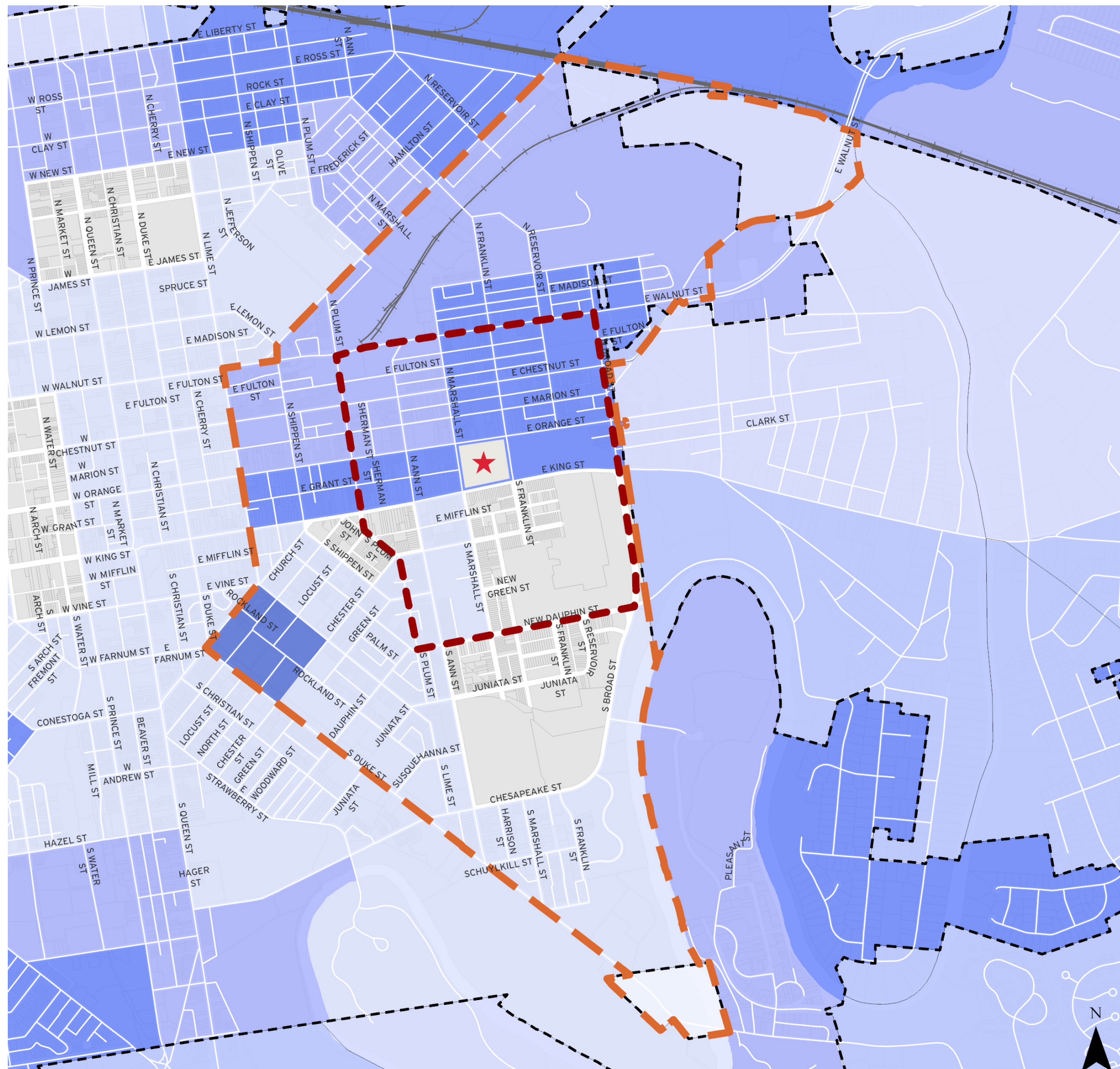
2.48
AVERAGE HH SIZE

43.9%
OF RENTER HOUSEHOLDS
ARE COST-BURDEN

1938
AVERAGE YEAR
STRUCTURE BUILT

\$61,014
MEDIAN HOUSEHOLD
INCOME





MEDIAN HOUSEHOLD INCOME

- Across the SSA income levels are higher north of E King St. than south of E King St.
- The disparity between incomes highlights the economic and community development opportunity presented by redevelopment of the prison site.
- Economic mobility is a City priority for this community.

SSA

NORTH
E KING ST.

\$75,073

MEDIAN
HOUSEHOLD
INCOME

SOUTH
E KING ST.

\$42,959

MEDIAN
HOUSEHOLD
INCOME



LEGEND

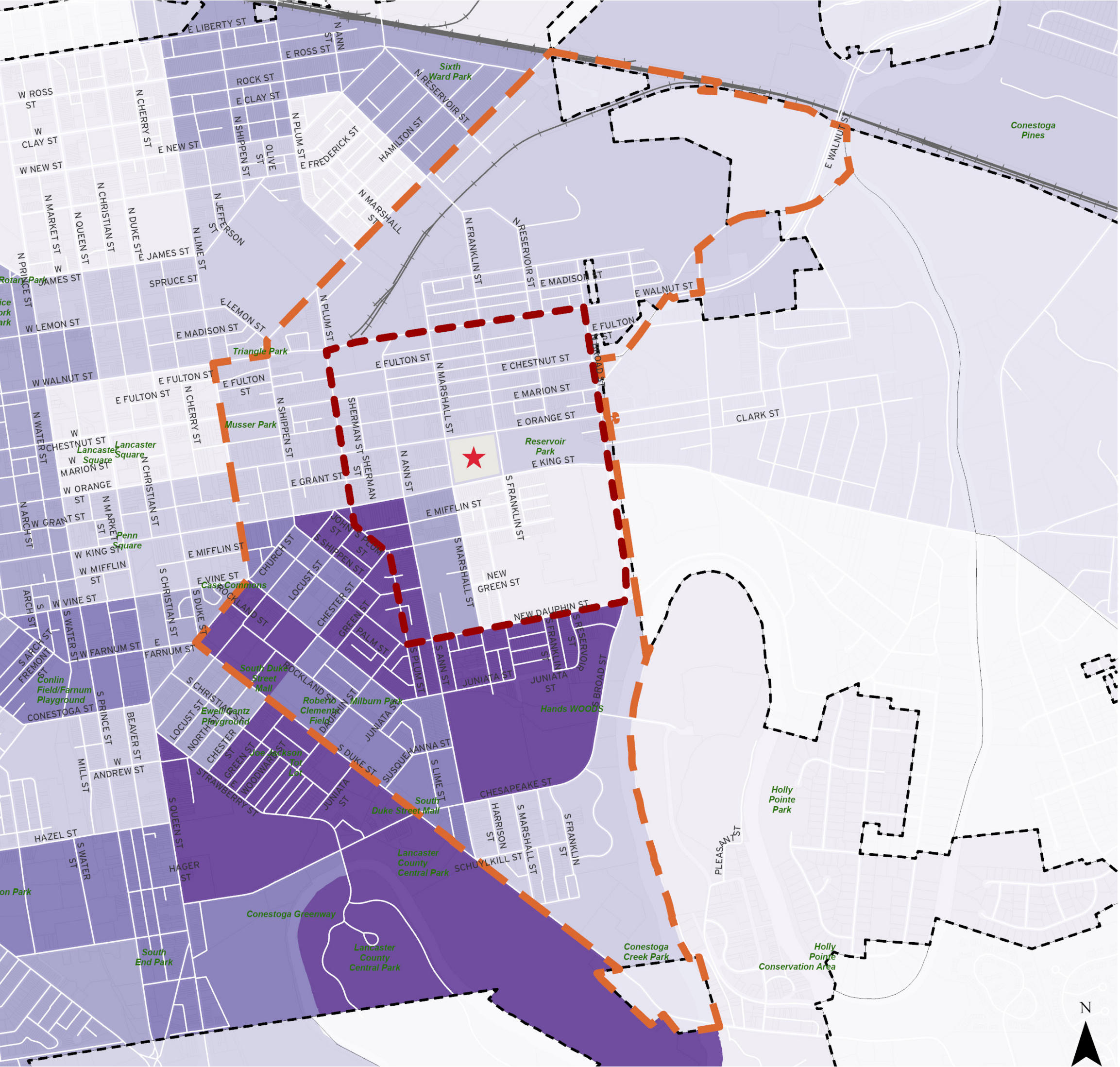
- City of Lancaster
- Primary Study Area
- Secondary Study Area
- ★ Lancaster County Prison

Median Household Income
per Block Group

- Less than \$55,000
- \$55,000 - \$78,000
- \$78,000 - \$98,000
- \$98,000 - \$130,000
- More than \$130,000
- No Data / Insufficient Data/Prison Site

HISPANIC OR LATINO POPULATION PERCENTAGE

- In the PSA, north of E King St., less than 40% of residents identify as Hispanic or Latino; in the southwestern portion over 80% of residents identify as such.
- Within the SSA, the majority of residents south of E King St. identify as Hispanic or Latino. There are multiple block groups in the southern portion of the SSA where residents who identify as Hispanic or Latino exceeds 80%. However, north of E King St. less than 40% of residents identify as Hispanic or Latino.
- In both the PSA and SSA, there are significant demographic differences between the areas north and south of E King St.



LEGEND

- City of Lancaster
- Primary Study Area
- Secondary Study Area
- ★ Lancaster County Prison

Percentage of Hispanic or Latino Population Per Block Group

Lightest Purple	0% - 20%
Light Purple	21% - 40%
Medium-Light Purple	41% - 60%
Medium Purple	61% - 80%
Dark Purple	81% - 100%
Lightest Blue-Gray	No Data / Insufficient Data/Prison Site

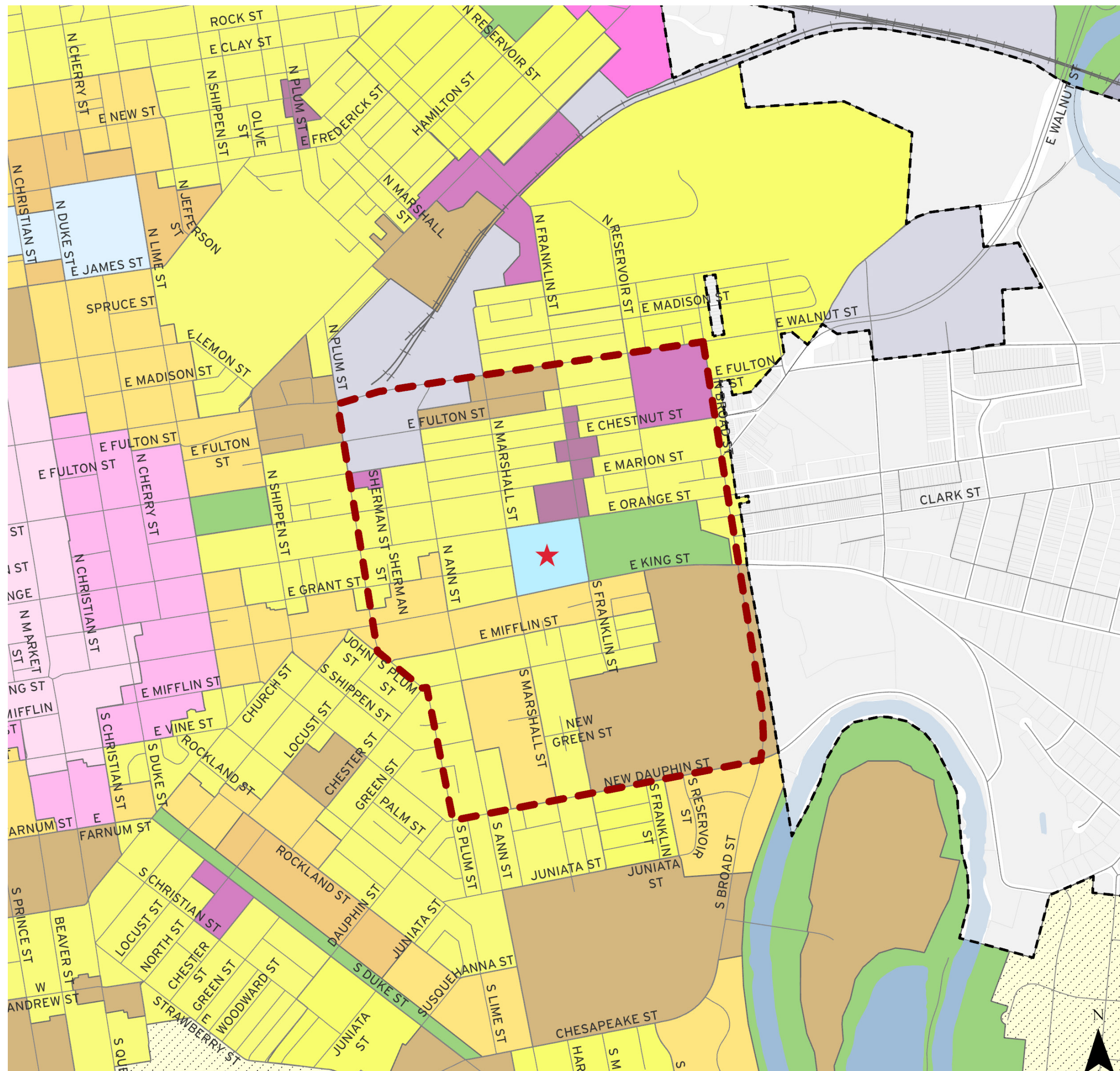
LAND USE



A corner grocery store on E. King St, diagonally across the County Prison. Photo Source: WRT

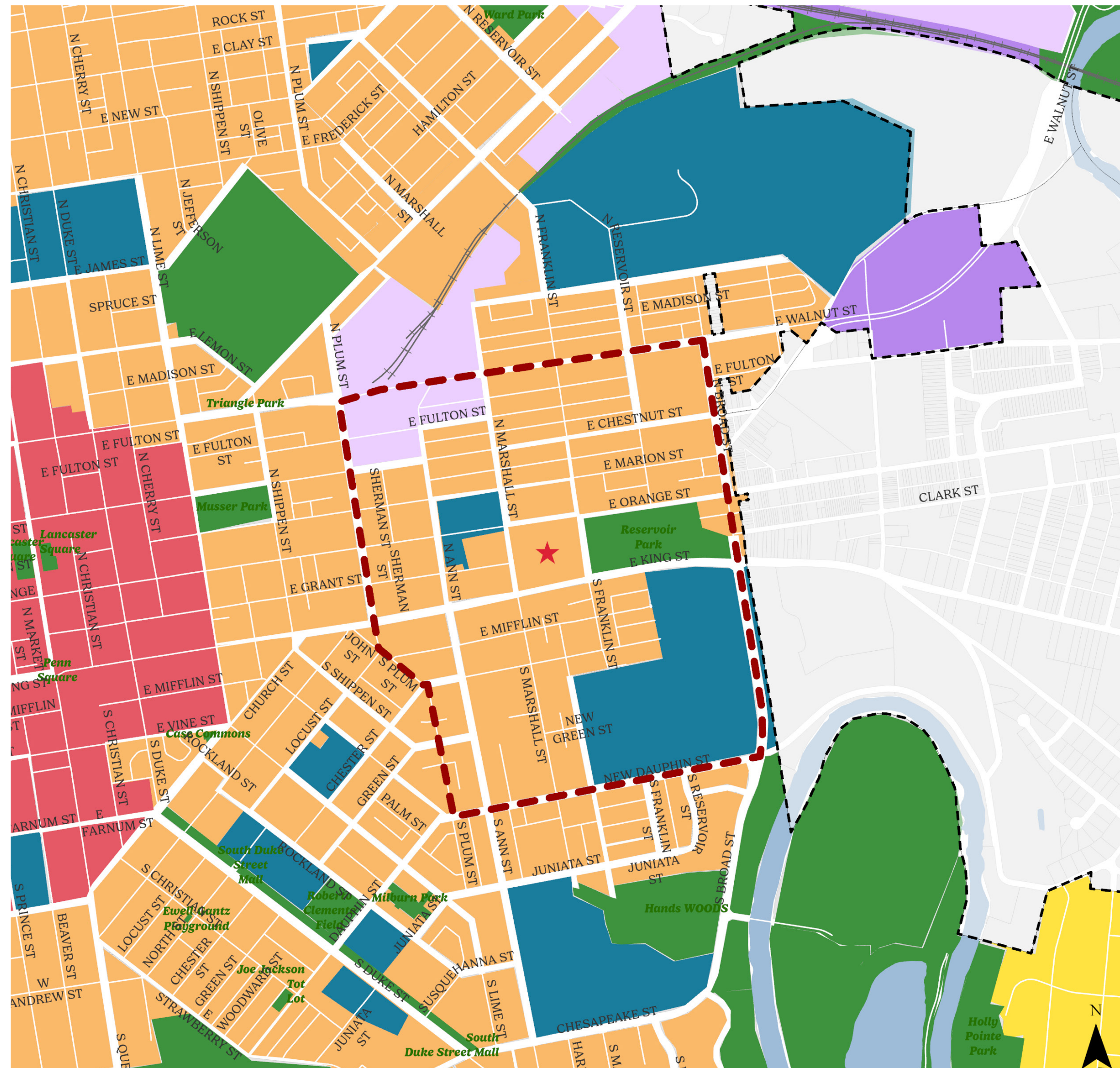
CURRENT ZONING

- The majority of the PSA is zoned residential, with most parcels zoned residential medium density and high density.
- The Thaddeus Stevens campus is zoned mixed-use as are a few smaller parcels in the northern area of the PSA.
- Directly north of the prison site is a few blocks of neighborhood commercial along N Franklin St.
- The prison site itself is zoned Criminal Detention meaning it will have to be rezoned for any future redevelopment on the site.



LEGEND

- City of Lancaster
- - - Primary Study Area
- ★ Lancaster County Prison
- +++ Railroad
- Parks
- Cemetery
- Water
- C1 - Neighborhood
- C2 - Urban
- C3 - Regional
- CB - Central Business
- CB1 - Central Business Core
- CM - Center City
- DF - Criminal Detention
- HC - Hospital Complex
- MU - Mixed-Use
- PO - Park/Open Space
- R1 - Detached
- R2 - Semi-Detached
- R3 - Medium Density
- R4 - High Density
- RO - High Dens/Office/Inst
- SM - Suburban City



FUTURE LAND USE

- The City's Comprehensive Plan Land Use Map designates the majority of the PSA as Neighborhood Mixed Use. Neighborhood Mixed-Use is defined as: Medium-density residential neighborhoods with occasional neighborhood-scale commercial amenities.
- The Future Land Use Plan labels the prison site as a 'land use change area' indicating it will likely undergo major land use changes in the next 10-20 years - requiring a small area plan to guide the future land use.
- The Comprehensive Plan also indicates that the East End, inclusive of the PSA, is a priority economic development area. The prison redevelopment and improvements to Reservoir Park will serve as catalysts.

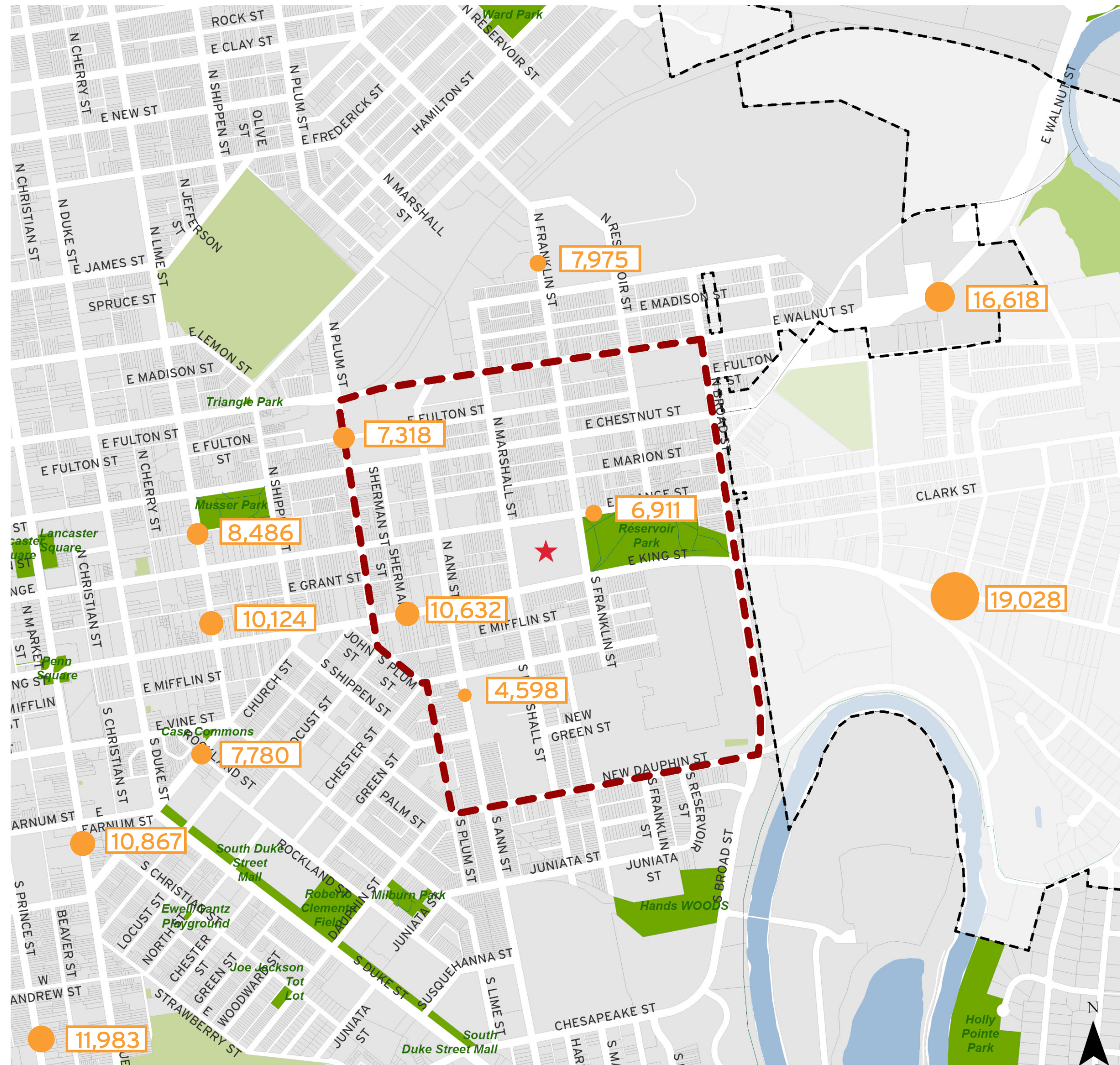
LEGEND

- | | | |
|---------------------------|------------------------|-------------------------------|
| --- City of Lancaster | Residential | General Commercial/Industrial |
| - - - Primary Study Area | Neighborhood Mixed Use | Light Industry & Innovation |
| ★ Lancaster County Prison | Urban Centers | Parks / Open Space |
| +++ Railroad | Institutional | |
| Water | | |

TRANSPORTATION INFRASTRUCTURE



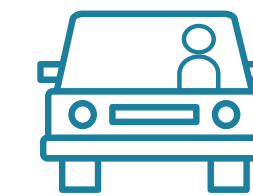
RRTA Bus. Photo Source: Red Rose Transit



TRAFFIC DATA

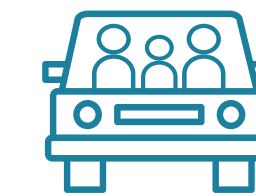
AVERAGE DAILY TRAFFIC COUNT (BOTH DIRECTIONS)

- Roads at the site have a 25 mph speed limit. However, through anecdotal and observational data, it has been observed that many don't adhere to the posted speed limit.
- Most crashes in Lancaster City happen at intersections, with 60% due to aggressive driving.
- Lancaster City is doing a one-way to two-way conversion study on E King and Orange Streets - this effort encourages vibrancy to downtowns, place making, increased storefront exposure, property values increase, improved mobility rates, improves walkability and pedestrian safety.



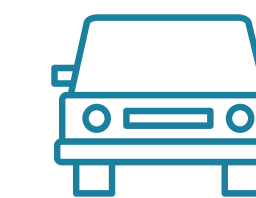
53%

OF WORKERS IN THE PSA DRIVE ALONE TO WORK



11.2%

OF WORKERS IN THE PSA CARPOOL TO WORK



82%

OF HOUSEHOLD IN THE PSA HAS AT LEAST 1 CAR

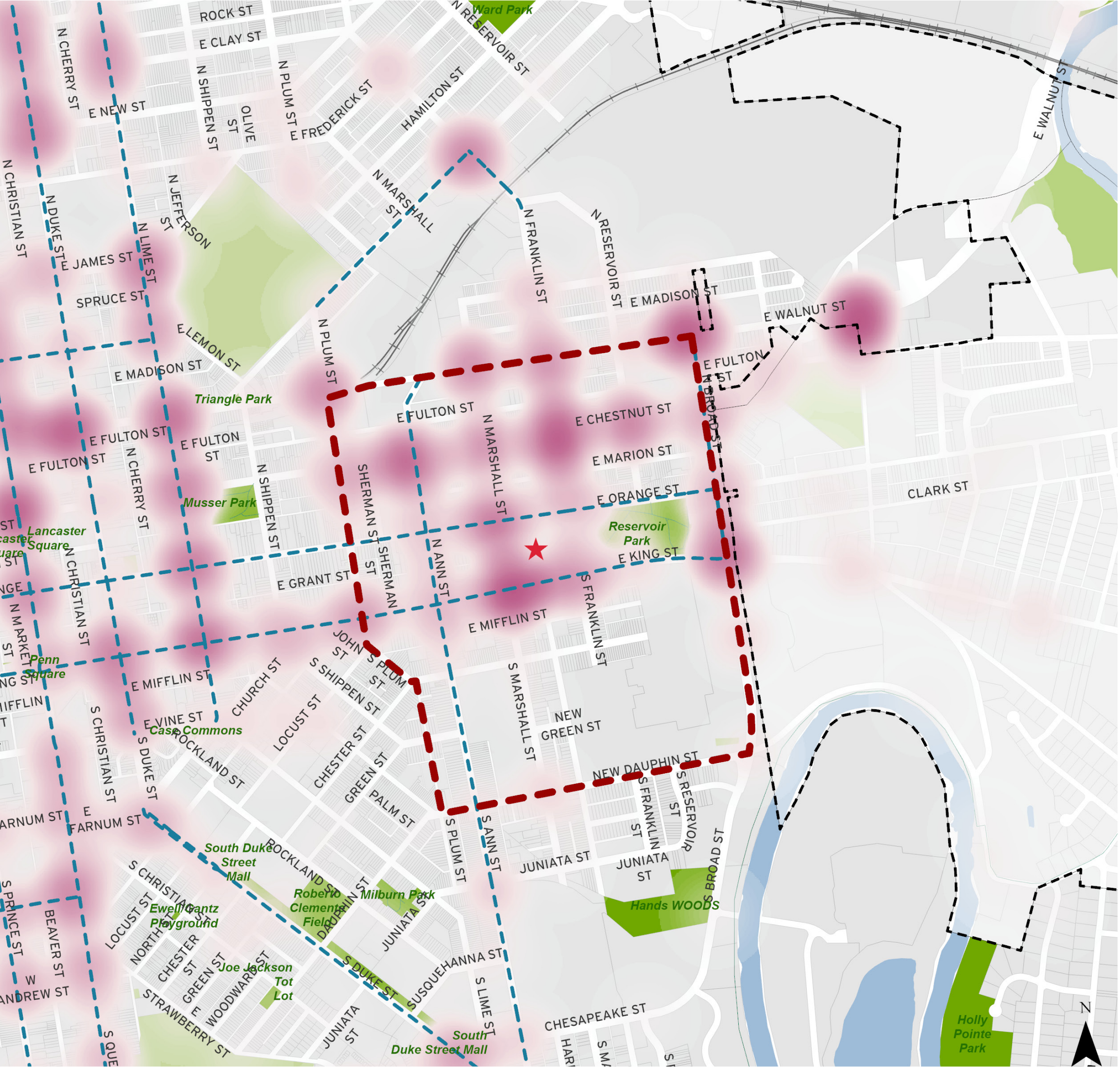
LEGEND

- City of Lancaster
- - - Primary Study Area
- ★ Lancaster County Prison
- +++ Railroad
- Parks
- Cemetery
- Water
- Traffic Counts

HIGH INJURY NETWORK

AND CRASH DATA

- A small portion (6%) of Lancaster’s streets accounts for 77% of the city’s serious and fatal crashes and 66% of all bicycle and pedestrian crashes. This highlights the disproportionate danger posed by these critical corridors.
- The High Injury Network (HIN) includes E Orange St. and E King St., the two major roads north and south of the prison site, as well as N Broad St., where many students cross at a particularly dangerous intersection. With 15% of PSA residents walking to work, addressing these safety concerns is critical.



LEGEND

- City of Lancaster
- ★ Lancaster County Prison
- Park
- Primary Study Area
- +++ Railroad
- Cemetery
- High Injury Network
- Density of Crashes (2022-2023)
- Water
- Dense
- Sparse

EXISTING CONDITIONS REPORT

DATA SOURCE: CITY OF LANCASTER; PASDA; HIGH INJURY NETWORK (2022)



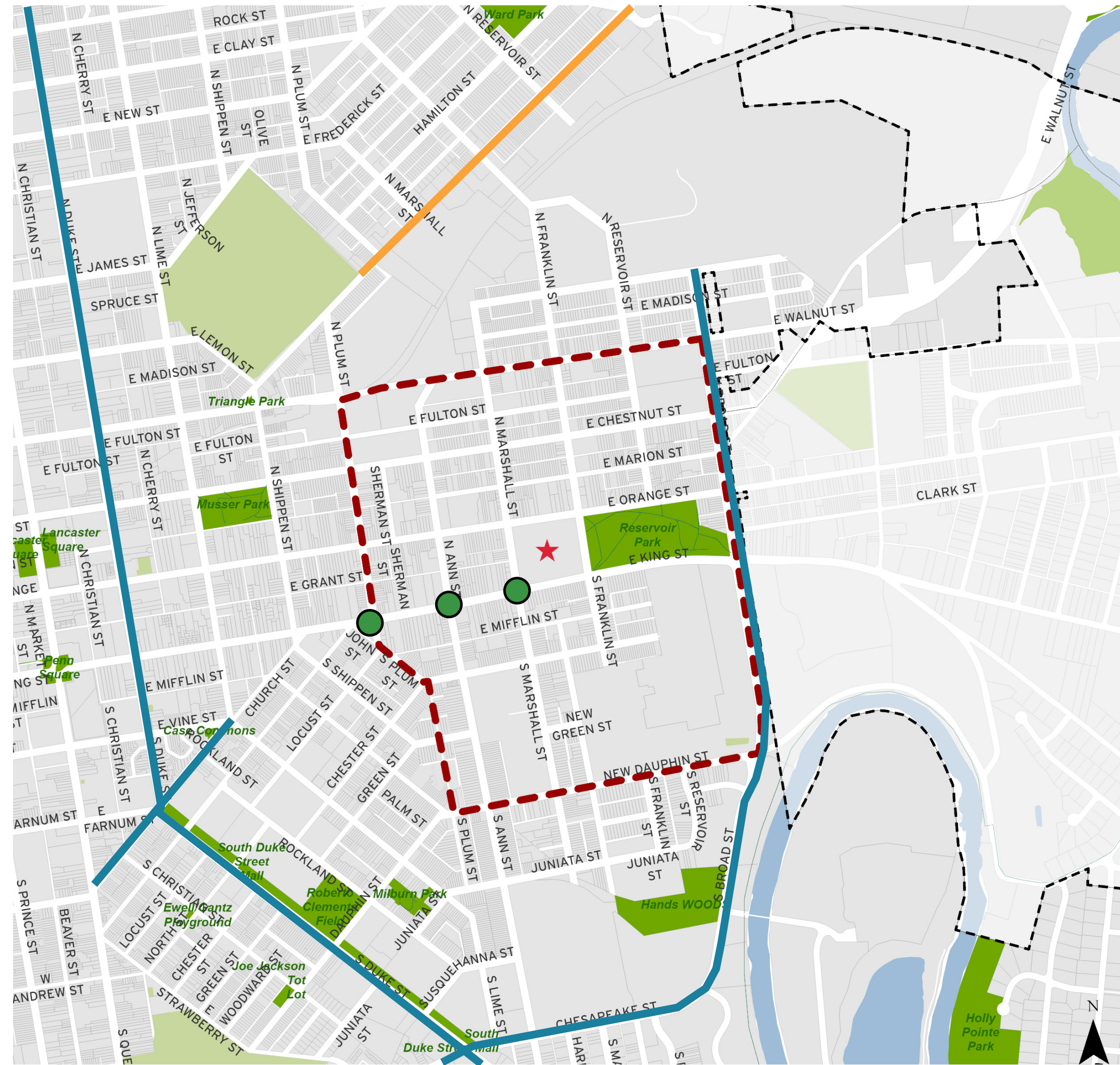
School buses seen at E Orange St. and N Franklin St. intersection
Photo Source: WRT



Freight truck seen driving through N Marshall St.
Photo Source: WRT

PLANNED TRANSPORTATION IMPROVEMENTS

- 2025-2028 Lancaster County MPO Transportation Improvement Program (TIP)
 - Safety Improvements on E King St. at Intersections of Ann St., Franklin St., and Marshall St.
 - The Eastbound Connector Phase 1 is completed and Phase 2 is under conceptual design phase.
 - Various resurfacing projects and paving projects in the surrounding area.
 - Congestion reduction projects are also planned to the north of the PSA.



LEGEND

- City of Lancaster
- ★ Lancaster County Prison
- Park
- Cemetery
- Water
- - - Primary Study Area
- +++ Railroad
- Resurfacing Projects
- Congestion Reduction
- Intersection Safety Improvements

EXISTING CONDITIONS REPORT

DATA SOURCE: CITY OF LANCASTER



Daylighting resulted from Vision Zero plan can be seen on intersections along E King St.
Photo Source: WRT



Daylighting resulted from Vision Zero plan can be seen on intersections along E King St.
Photo Source: WRT

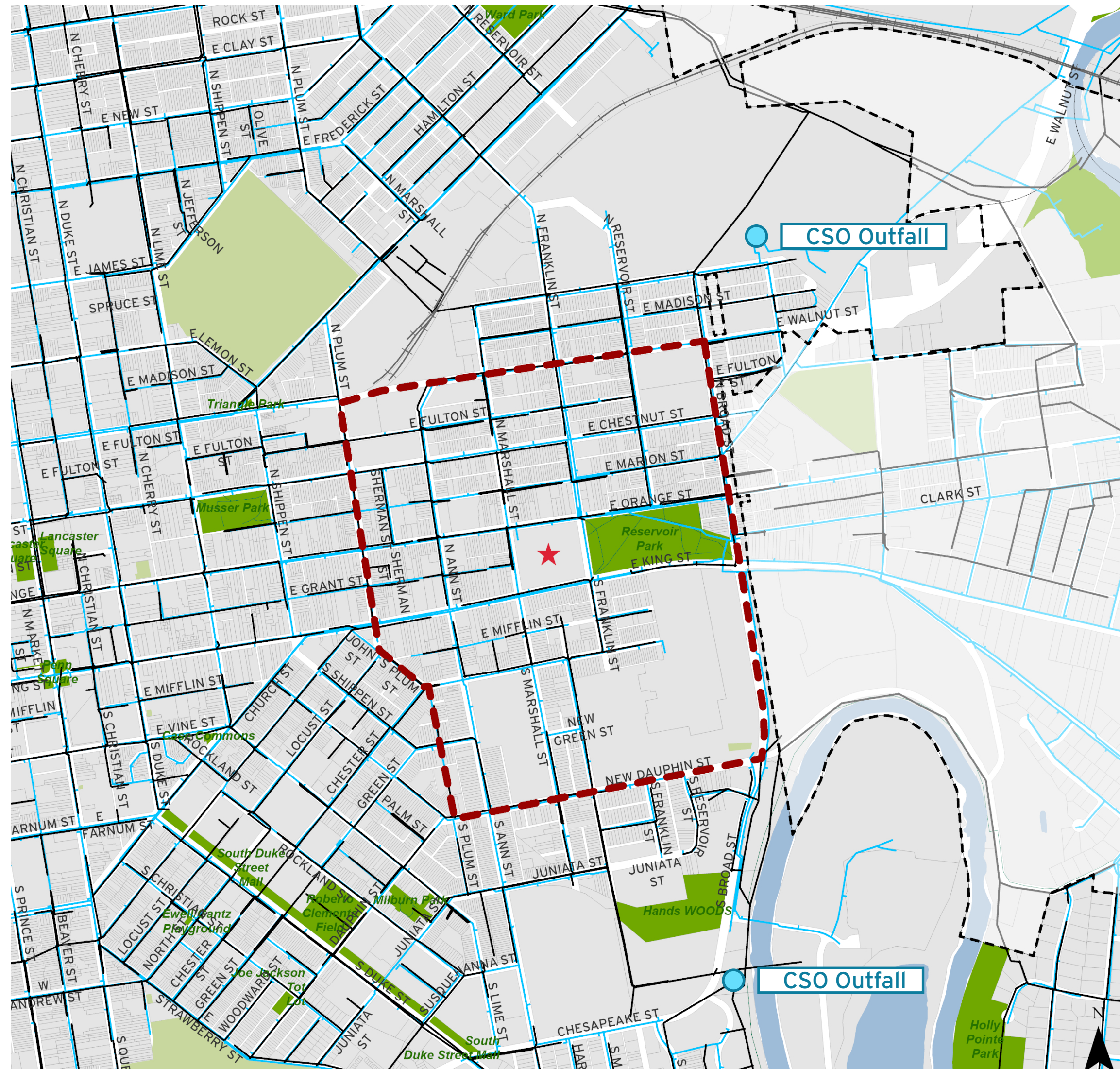
PRIVATE + PUBLIC INFRASTRUCTURE



Housing along E. Orange St. Photo Source: WRT

SEWAGE AND WATER MAIN

- The PSA is fully served by the City's water and sewer infrastructure. And there is a lot of capacity in this area.
- A 20" main along E Orange St. that was built in the late 1800s and relined in 2005.
- With the current demands on the utilities from the prison site, any utility needs of a future redevelopment project(s) will likely be satisfied by existing infrastructure.



LEGEND

- | | |
|---------------------------|-----------------------------------|
| --- City of Lancaster | — City Gravity Sewer Mains |
| - - - Primary Study Area | — City Water Mains |
| ★ Lancaster County Prison | ● Combined Sewer Overflow Outfall |
| +++ Railroad | |
| ■ Parks | |
| ■ Cemetery | |
| ■ Water | |

PLACEMAKING



Reservoir Park. Photo Source: WRT

RESERVOIR PARK & OPEN SPACE



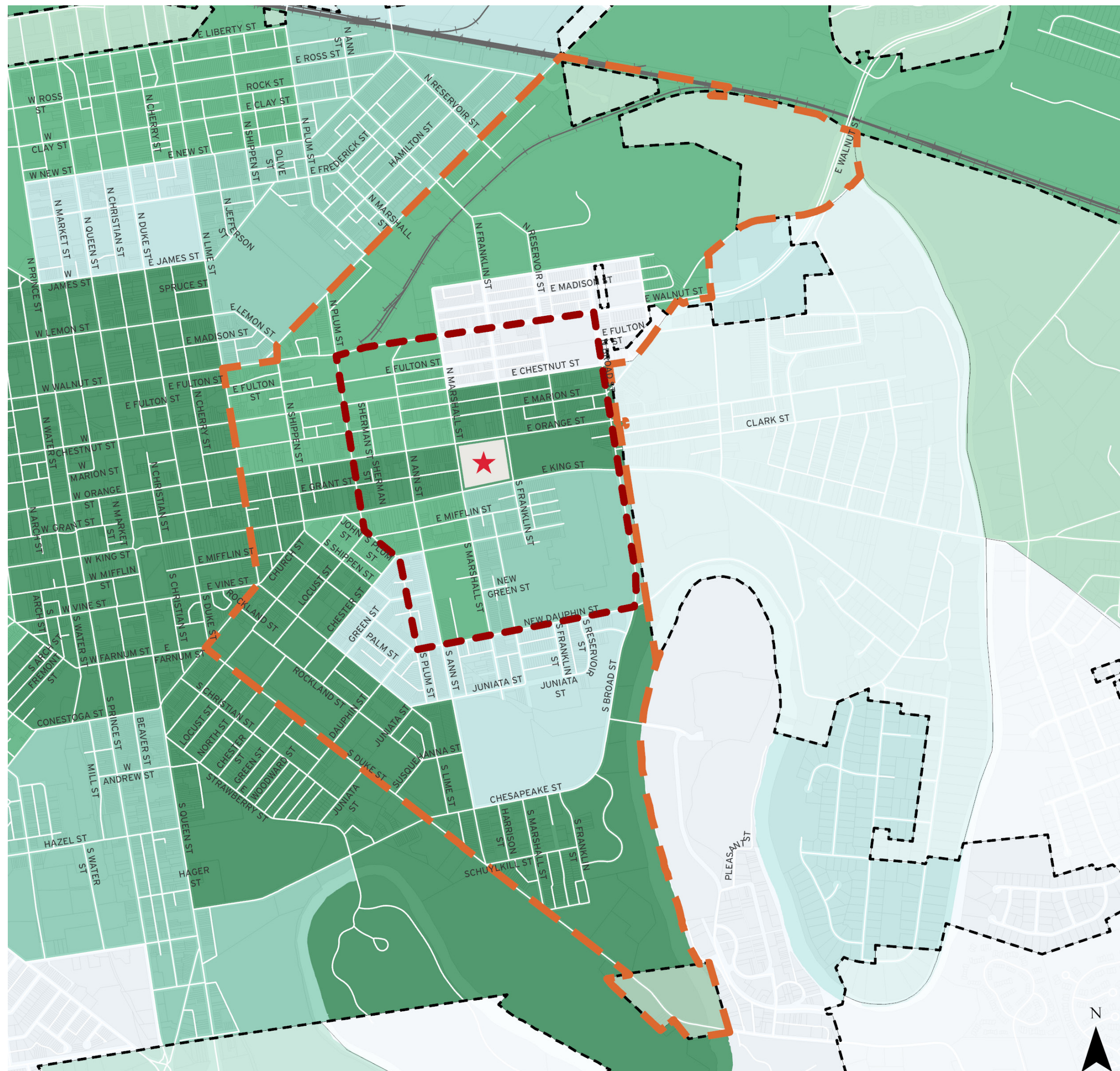
- LEGEND**
- ↔ Primary Circulation
 - Secondary Circulation
 - ≡ Stairs
 - Seating [Bench & Picnic Table]
 - ⋯ Existing Crosswalk
 - ⋯ Potential Crossing
 - 22' 64' Crosswalk Distance [Feet]
 - ▨ Intersection Daylighting [Curbless]
 - Park or Open Space

Reservoir Park sits within a network of open spaces at the City's eastern gateway.

MARKET CONDITIONS



C-Town Supermarket. Photo Source: WRT



RENTAL MULTIFAMILY PERFORMANCE

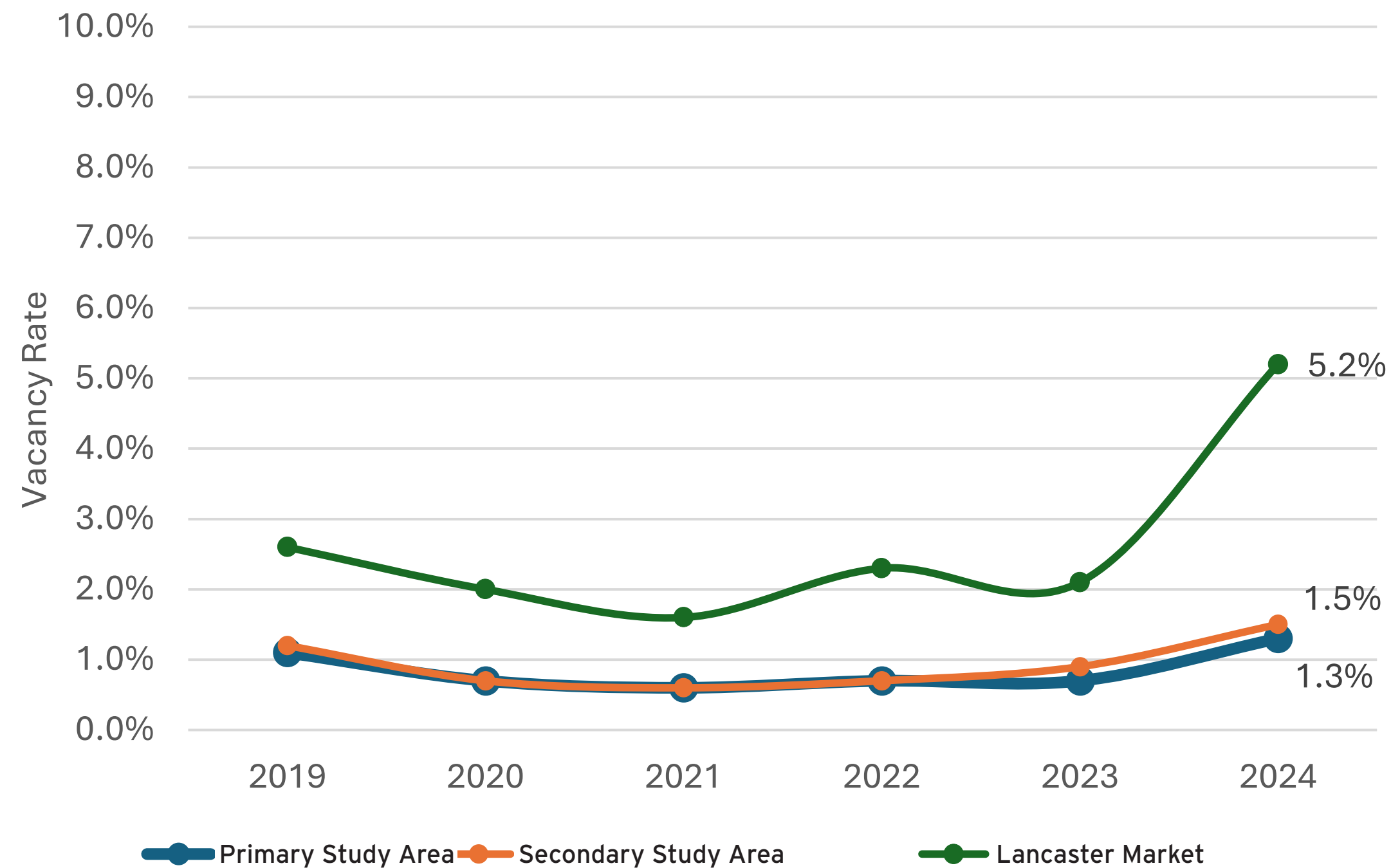
- According to CoStar, the PSA contains 403 multifamily rental units in buildings with 10 or more units.
 - Two-thirds of the units in the PSA were built in the 1980s, making it the most active decade for rental multifamily construction.
 - No new units have been built in the PSA in nearly four decades.
 - The PSA's 403 units make up only 1.5% of the total units in the market.
- The SSA contains 1,174 units, with 28 units built in the last five years.
- The larger Lancaster housing market, defined by CoStar as Lancaster County, hosts 27,160 units. Approximately 3,200 units have been built in the last five years.

LEGEND

--- City of Lancaster	Renter Percentage per Block Group
--- Primary Study Area	0% - 15%
--- Secondary Study Area	16% - 30%
★ Lancaster County Prison	31% - 45%
	46% - 67%
	68% - 98%
	No Data / Insufficient Data

VACANCY IN LANCASTER RENTAL MARKET

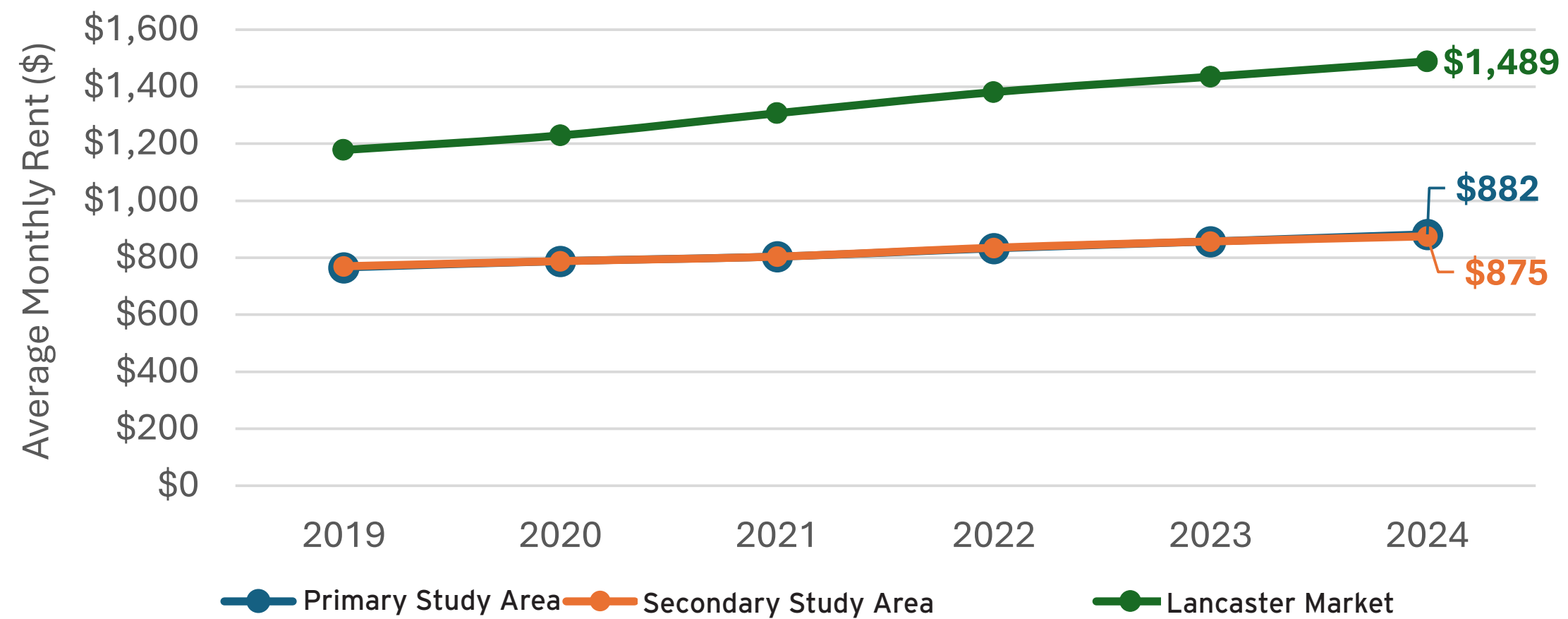
Comparison of Vacancy Rate Trends, 2019-2024



- Vacancy rates across all three analysis areas have historically been extremely tight, with the Primary Study Area and the Secondary Study Area demonstrating rates of 1.5% or less.
- Based on the total inventory in the Study Area, the vacancy rate at year-end 2024 equates to only five available units.
- The Lancaster Market, which has experienced an expansion of new supply in recent years, has a slightly higher vacancy rate of 5.2%, still notably lower than the industry standard 7.0% rate that typically is used to measure market health.
- Across all three geographies, vacancy has risen between 2023 and 2024, influenced by the completion of 1,110 new units in the larger market area in 2024. This new supply has caused the vacancy rate to increase as the available new units are leased.

TRENDS IN RENTAL COSTS

Comparison of Monthly Rent Trends, 2019-2024



- Rents in the PSA and SSA are nearly identical, following a similar growth pattern of +2- 3% per year.
- The Lancaster housing market reports a strong premium over the study areas, typically measuring rents that are +25-28% higher. The rate of rent growth in the market has also been faster, at +5-8% per year.
- Two of the newest, top performing developments are highlighted to the left. Both are located west of the Study Areas in Downtown Lancaster. They are both mid-rise buildings with structured parking located on nearby sites. Both projects also offer retail on the ground floor.



The Alistair
 347 N Queen Street
 Mid-rise, opened September 2024
 72, one-bedroom units
 83.5% vacant (in lease-up)
 \$1,875 per month / \$2.89 pSF



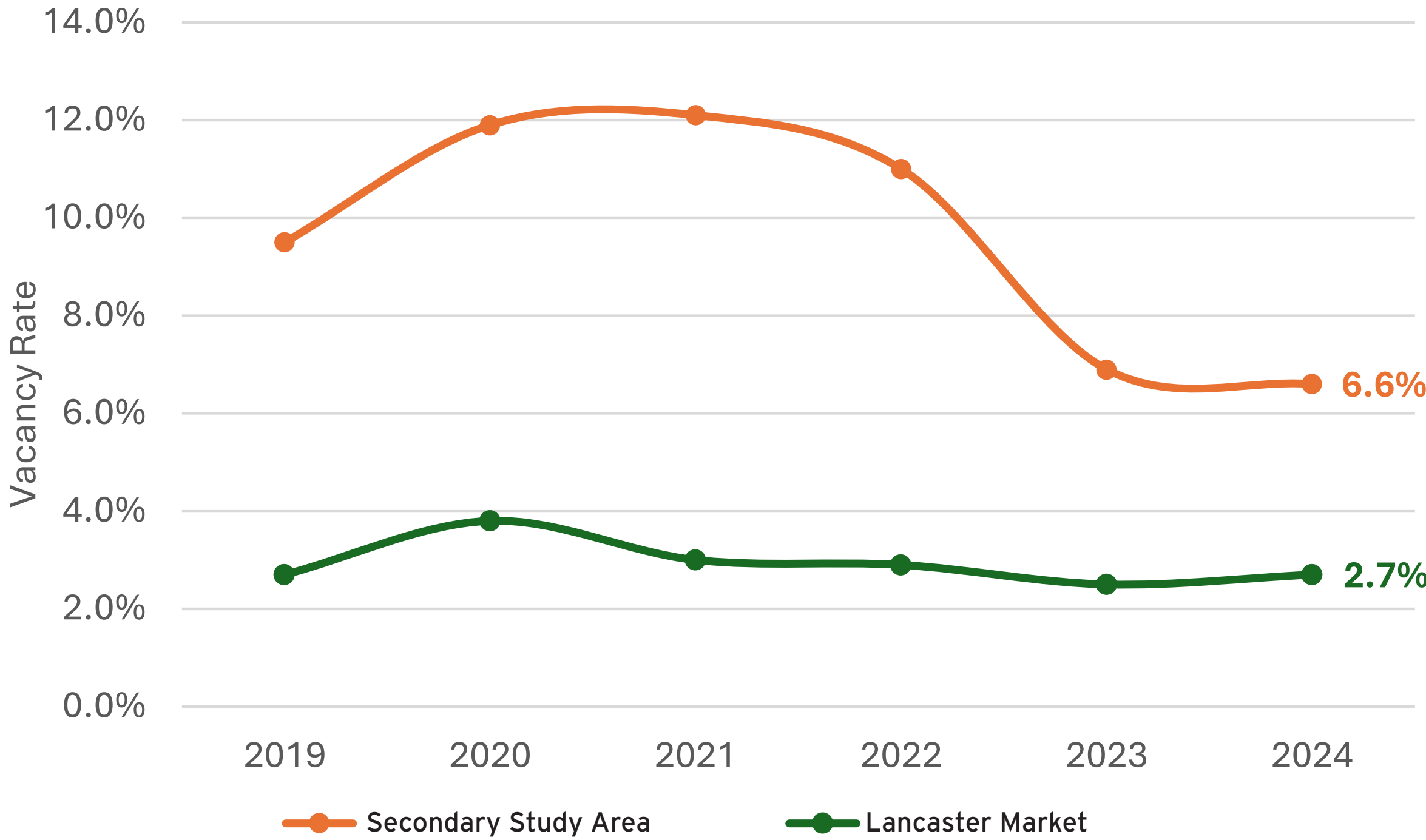
202 Queen Apartments
 202 N Queen Street
 Mid-rise, opened July 2024
 142, studio, one, and two-BR
 62.2% vacant (in lease-up)
 \$2,236 per month / \$2.70 pSF

EXISTING CONDITIONS REPORT

DATA SOURCE: COSTAR, KIMLEY-HORN

RETAIL SPACE - VACANCY

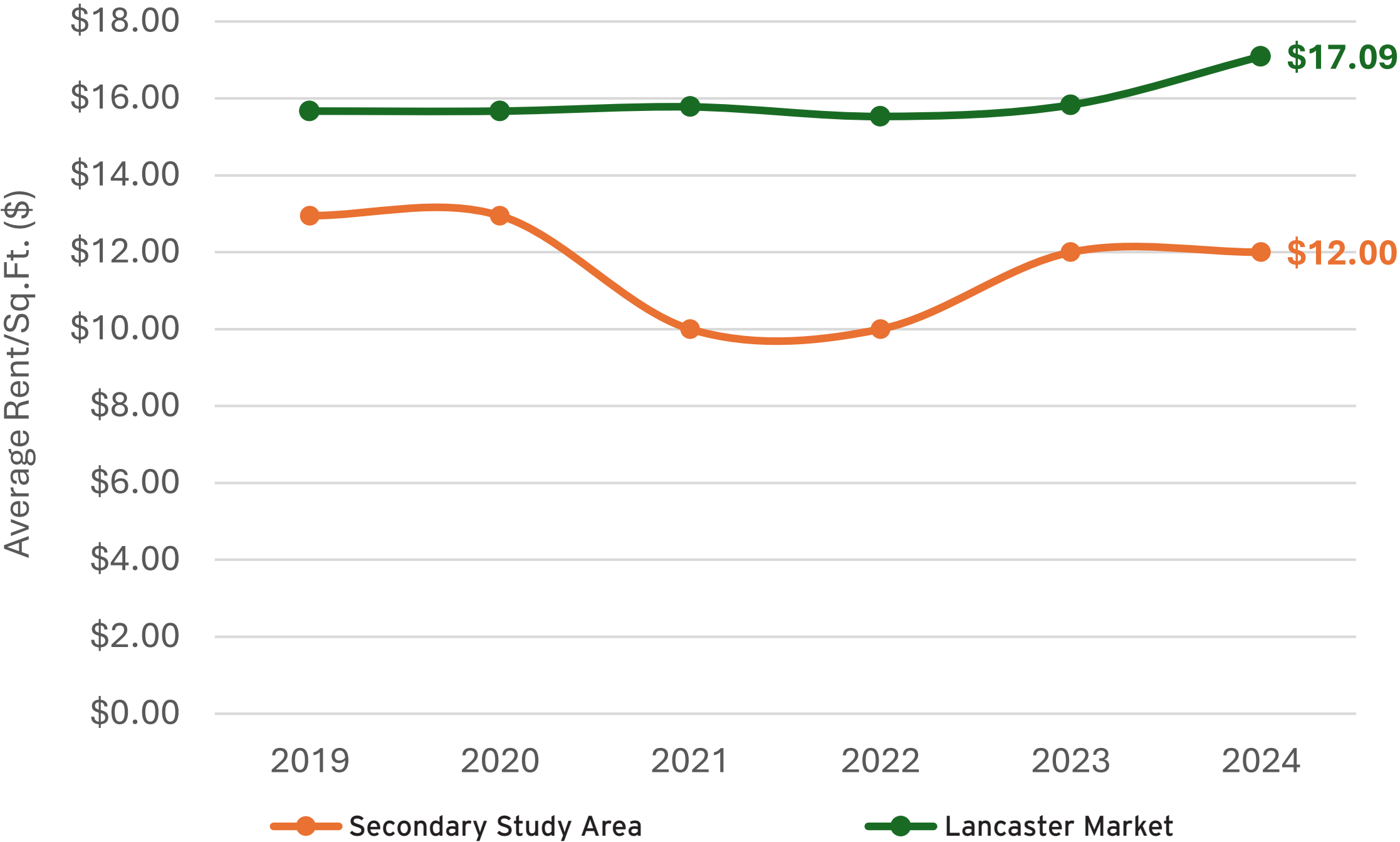
Comparison of Vacancy Rate Trends, 2019-2024



- Based on data by CoStar there is no vacant and available space in the PSA. Trend data is extremely limited.
- The SSA has a current retail vacancy rate of 6.6%, one of the lowest measures in the last five years. The rate is higher than the Lancaster retail market that has typically remained around 2-3% year-over-year, despite new construction.

RETAIL LEASE RATES

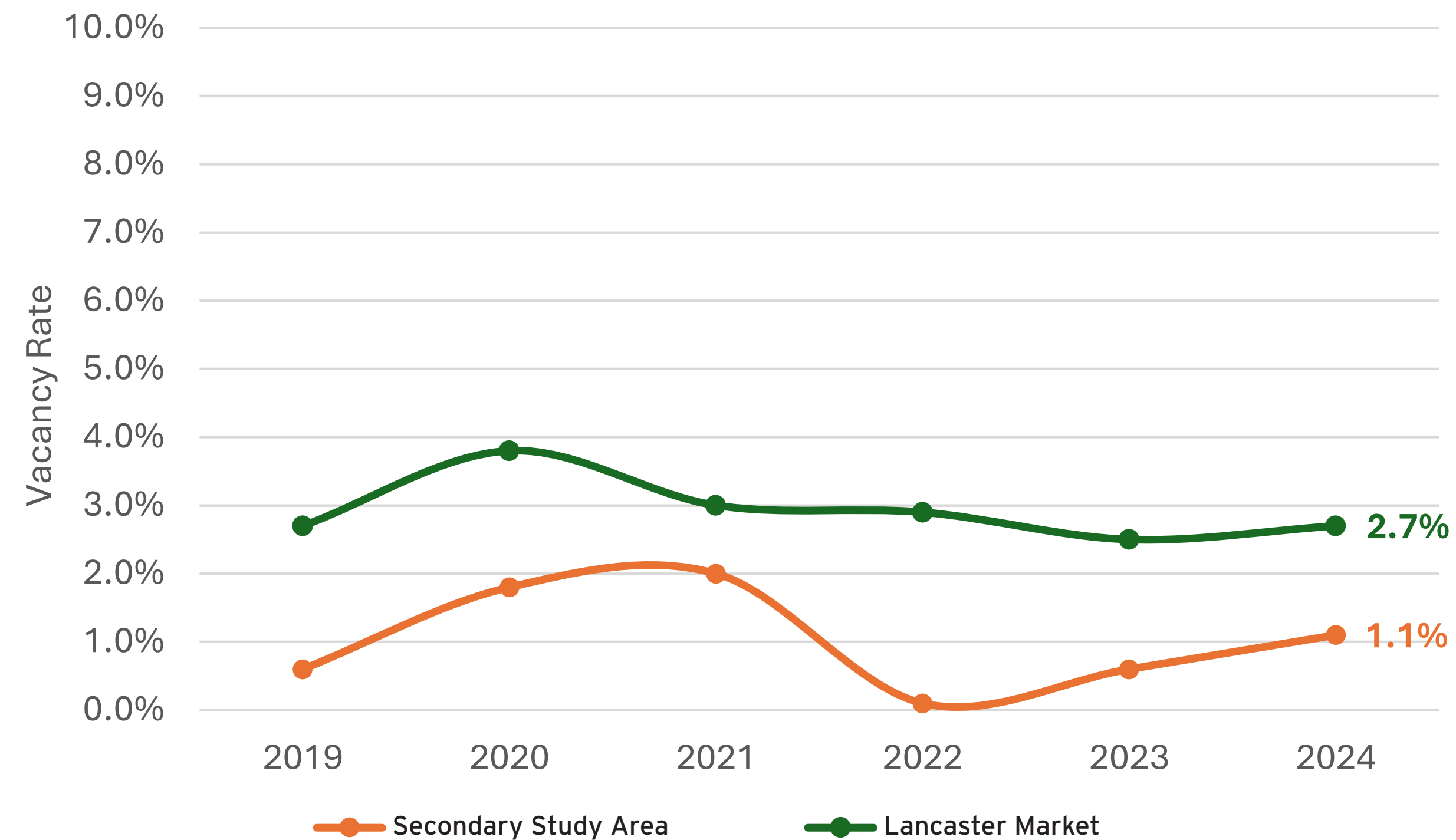
Comparison of Rent/SF Trends, 2019-2024



- Rent information was extremely limited in the PSA, likely due to a lack of reporting and slow turnover in the area.
- The Lancaster retail market demonstrates a strong premium over the SSA. The largest premiums occurred following COVID, when market rents were more than 35% higher than the SSA. Currently the market has rent that are 29.8% higher.
- Neither areas have experienced strong gains in rental rates. The SSA declined since 2019, and the Lancaster market remained relatively flat until a recent increase in the last 18 months, reaching \$17.09 per square foot on average.

OFFICE SPACE - VACANCY

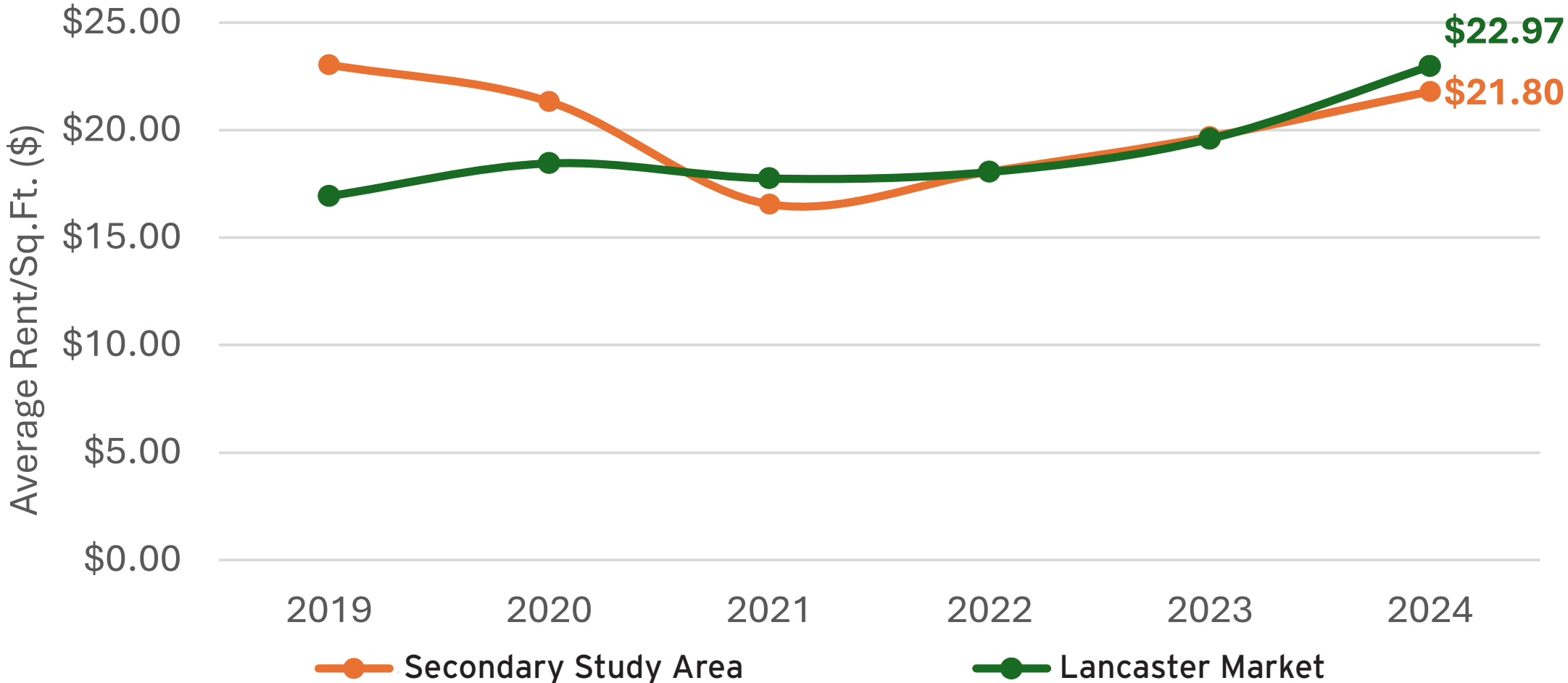
Comparison of Vacancy Rate Trends, 2019-2024



- There is no space available for lease in the PSA, resulting in very limited trend data on vacancy or rents.
- The SSA has an extremely low 1.1% vacancy rate and the larger Lancaster market is only at 2.9%. This stands out in a period where many urban areas are experiencing elevated vacancy rates due to shifting work arrangements following COVID.

OFFICE LEASE RATES

Comparison of Rent/SF Trends, 2019-2024



- Rent information for the PSA is extremely limited.
- The SSA has experienced an overall decline in rents but has generally been improving year over year since the market was impacted following the pandemic, reaching a \$20.38 per per square foot (psf) average at year-end 2024.
- The Lancaster office market has experienced steady improvement, reaching an average of nearly \$23 psf. As of end of 2024, the market averages exceeded the SSA.
- Two of the newest, top performing developments are highlighted to the left. Both are located west of the Study Areas in Downtown Lancaster. They both offer ground-level retail and are served by structured parking spaces. Both buildings are multi-tenant (not owner occupied).



23 King Street
 4-star, multi-tenant
 Opened June 2019
 59,500 square feet
 0.0% vacant
 \$28-30 pSF, estimated
 Ground-level retail



Woodstream Corporation Building
 29 E King Street
 4-star, multi-tenant
 Opened 2019
 72,655 square feet
 8.3% vacant
 \$23.78 pSF, quoted
 Ground-level retail

MARKET CONSIDERATIONS FOR SITE REDEVELOPMENT

Residential

- Rental housing offers a strong opportunity for site redevelopment.
- Vacancy rates remain low despite new market additions, indicating a healthy rental market.
- No new rental developments have been added in the PSA or SSA.
- Downtown properties achieve rents that support redevelopment, but PSA and SSA rents lag behind.
- Maximizing density and considering financial incentives can help offset lower rent targets.

Retail

- Retail could be considered as a complimentary or secondary use to activate the site.
- Existing retail in the Study Area is limited but highly occupied.
- New retail pricing should consider local tenants, with options for subsidies or smaller spaces to enhance affordability.

Office

- While office space in the PSA, SSA, and Lancaster County is performing well, it is unlikely to be an anchoring land use in the short-term due to financing challenges nationally.

OPPORTUNITIES AND CONSTRAINTS



EXISTING CONDITIONS

OPPORTUNITIES

CONSTRAINTS

LAND USE

- Future land use map identifies 'Neighborhood Mixed-Use' as a priority land use for this area .

- Prison parcel will have to be rezoned for any future redevelopment

TRANSPORTATION INFRASTRUCTURE

- Multiple planned improvements in PSA including Vision Zero improvements and Eastbound Connector Phase 1 (bicycle infrastructure).
- Long-term plan for one-way to two-way conversions of King and Orange Streets.

- PSA has multiple 'High Injury Network' streets and intersections, including all four corners of the prison site.
- One-way streets (Orange and King) cause speeding and unsafe pedestrian/bike conditions.

PUBLIC AND PRIVATE INFRASTRUCTURE

- Green infrastructure and 'complete streets' improvements planned for PSA.
- Water and sewer infrastructure sufficient for large-scale redevelopment.

- Redevelopment of prison site may result in higher percentages of impervious surfaces, requiring larger stormwater management systems.

PLACEMAKING

- Future master planning efforts for Reservoir Park may align well with redevelopment of prison site.
- Opportunities to activate street frontage in and around prison .

- Scale of redevelopment could impact placemaking opportunities.

REDEVELOPMENT/ MARKET CONDITIONS

- Strong market for housing development on prison site (currently low vacancy rates in PSA/SSA).
- Opportunities for secondary uses of retail based on local market demand.

- Demolition and site prep costs associated with redevelopment will be high.
- To be financially feasible, there will need to be density on-site which could be incongruous with existing neighborhood character.