10thousandFriends
OF PENNSYLVANIA
LEADING THE WAY ON SMART GROWTH

Promoting Healthy & Walkable Places in Pennsylvania's Core Communities

A White Paper from 10,000 Friends of Pennsylvania

Table of Contents

Introduction

One key fact has driven 10,000 Friends' work for the past five years: Cities and towns that are walkable prove to be healthier, greener, more vibrant and are increasingly well positioned for economic success. This fact led 10,000 Friends in 2015 to recalibrate its focus and develop 10,000 Friends' Healthy and Walkable Communities Initiative aimed at providing technical assistance to communities lacking resources and capacity to make investments needed to improve community design.

It is a fact that is not just evident empirically, but also confirmed by research undertaken by health care and community development experts. In 2015, the Office of the Surgeon General of the US Department of Health and Human Services released a national directive "Step It Up! The Surgeon General's Call to Action to Promote Walking and Walkable Communities to increase walking among people across the United States." (See Appendix A). Prompted by years of mounting research evidence that community design that encourages sedentary lifestyles is contributing mightily to a growing epidemic of obesity and chronic diseases, the Surgeon General made a compelling case:

"One out of every two U.S. adults is living with a chronic disease, such as heart disease, cancer, or diabetes. These diseases contribute to disability, premature death, and health care costs. Increasing people's physical activity levels will significantly reduce their risk of chronic diseases and obesity. Increasing walking requires improving walkability – and that means that communities are redesigned, created, or enhanced to make it safe and easy to walk and that pedestrian activity is encouraged for all people of all ages and abilities. Actions by multiple sectors and professions working in a community, as well as by families and individual residents themselves, are needed to achieve these goals."

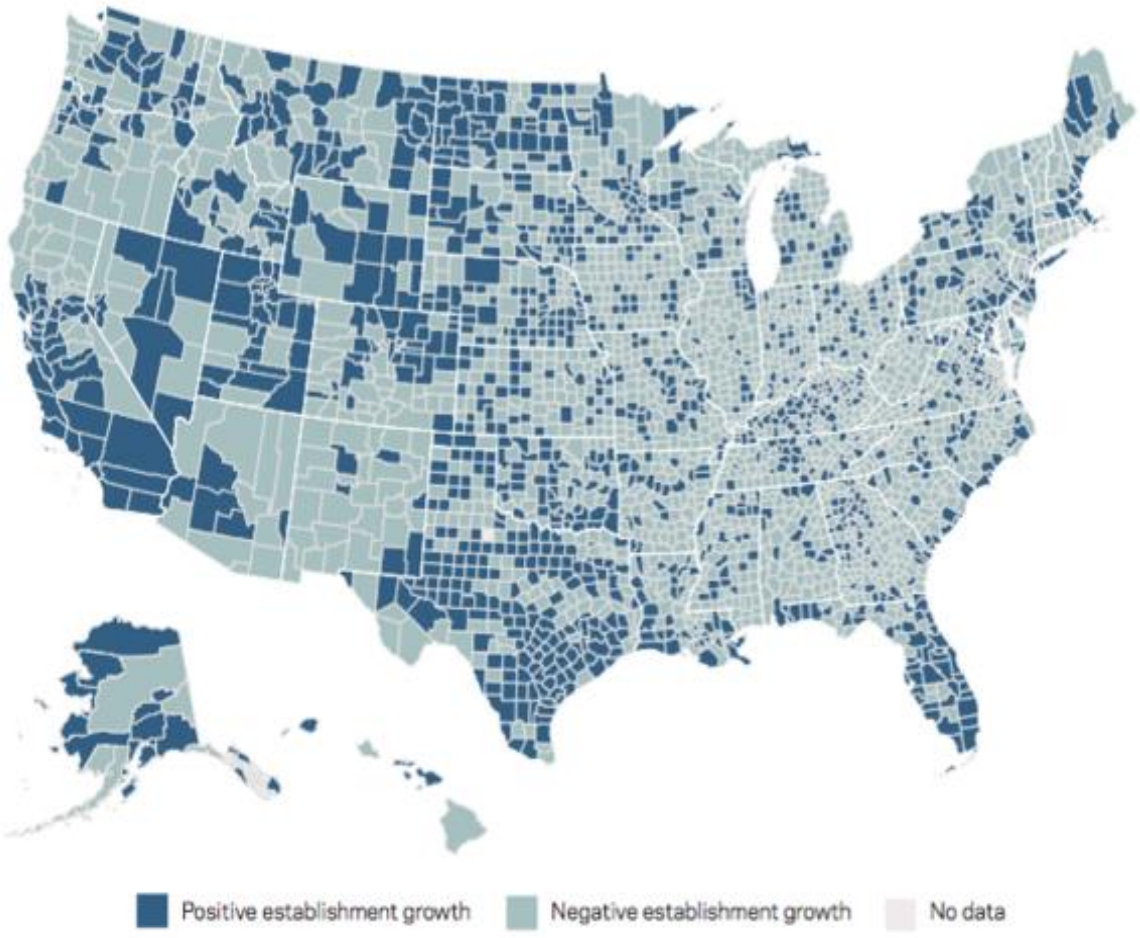
Research in a 2016 report from the Economic Innovation Group recently added to the well-known story of income inequality in the United States with shocking facts about the deepening national geographic concentration of economic inequality that is occurring concurrently. Seen in the following table, taken from their report, "The New Map of Economic Growth and Recovery," just 20 counties — representing less than 1% of America's 3,000+ counties – accounted for over *half* of all new business establishments in the entire country over the years 2010-2014:

20 COUNTIES GENERATED HALF OF NET NEW ESTABLISHMENTS

Rank	County	Metro Area	Increase in Est.	Population Rank
1	Los Angeles County, CA	Los Angeles	14,540	1
2	Miami-Dade County, FL	Miami	6,790	8
3	Kings County, NY (Brooklyn)	New York	6,510	7
4	Harris County, TX	Houston	5,990	3
5	Orange County, CA	Los Angeles	4,430	6
6	Queens County, NY	New York	4,210	10
7	San Diego County, CA	San Diego	4,160	5
8	Travis County, TX	Austin	3,790	39
9	Palm Beach County, FL	Miami	3,610	28
10	Broward County, FL	Miami	3,010	18
11	Maricopa County, AZ	Phoenix	2,980	4
12	Cook County, IL	Chicago	2,960	2
13	Santa Clara County, CA	San Jose	2,900	17
14	Collin County, TX	Dallas	2,890	73
15	Orange County, FL	Orlando	2,700	35
16	Tarrant County, TX	Dallas	2,630	15
17	San Francisco County, CA	San Francisco	2,600	67
18	Clark County, NV	Las Vegas	2,430	13
19	New York County, NY	New York	2,330	20
20	Dallas County, TX	Dallas	2,190	9

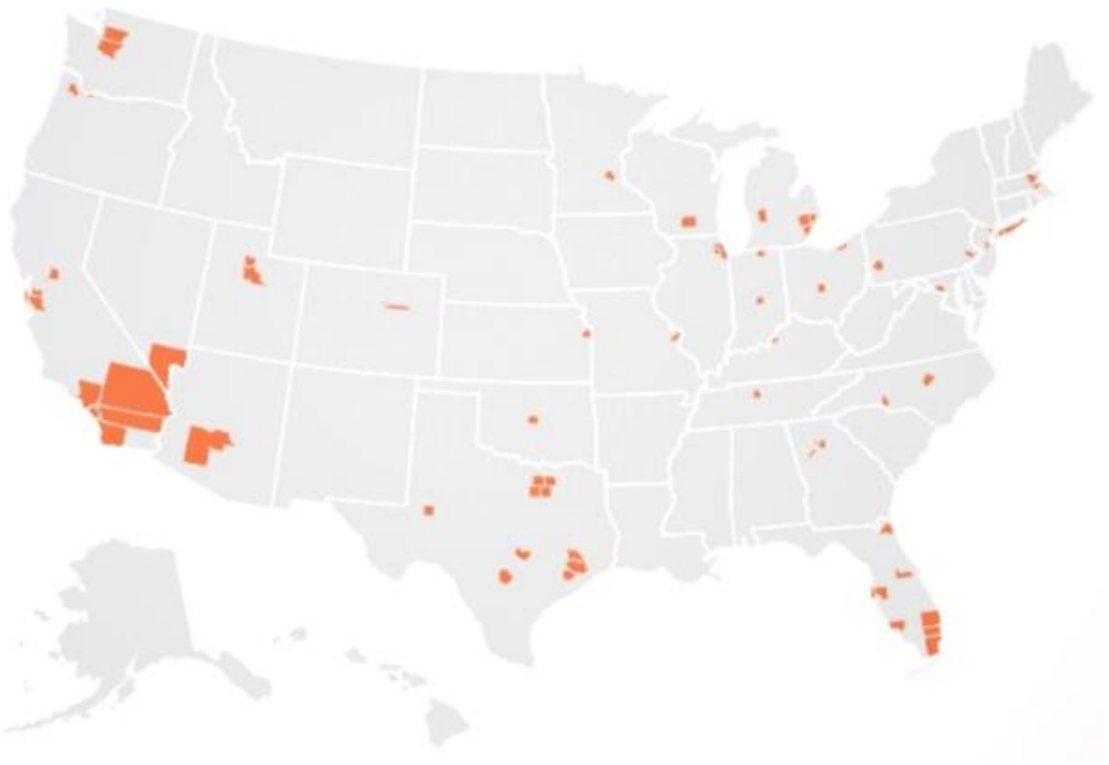
The counties where 50% of all new businesses were created in the first 5 years following the most recent, 2007-2009 recession accounted for only 17% of the U.S. population.

Looking across the nation, the following map shows all the counties and indicates those with a positive and negative net change in businesses 2010-2014. Across America, 59% of all counties saw a net loss of business establishments over 5 years of a national economic expansion. Three in five counties saw more businesses close than open, according to data from the same Economic Innovation Group Study, and only one in four counties increased businesses at the same rate as the nation as a whole:



Net Change in Business Establishments from 2010-2014

The sobering story is much the same on job creation — which also as described in "The New Map of Economic Growth and Recovery" is very highly concentrated. The 73 counties highlighted in orange in the map below — including only 2 counties in Pennsylvania — accounted for fully half of all jobs created from 2010-2014. Still more troubling, almost one third (31%) of all U.S. counties lost jobs from 2010-2014, during five years of recovery and economic expansion:



73 U.S. Counties Accounted for More than Half of All New Jobs Created over the Last 5 Years

This stark rise of an increasingly geographically concentrated knowledge economy has been aptly described in CityLab as being fueled by the clustering of knowledge, talent, and innovation (See "Geographic Inequality is Swallowing the Recovery," Citylab.com, https://www.citylab.com/equity/2016/05/there-are-more-losers-than-winners-in-americas-economic-recovery-due-to-geographic-inequality/483989/).

Urbanized centers that are home to leading institutions and a highly educated workforce are increasingly responsible for the vast majority of economic innovation and entrepreneurial activity that are driving job creation in the twenty-first century.

Just a year earlier, the Center for Real Estate and Urban Analysis (CREUA) at George Washington University's School of Business released a report entitled *Foot Traffic Ahead: Ranking Walkable Urbanism in America's Largest 30 Metros*. CREUA has

developed a cutting-edge methodology to analyze the success and potential of walkable urban places as regional economic drivers. Maximizing the potential of regional economic assets, including universities, education and training institutions, and major medical centers/hospitals is a key component of the methodology. The research demonstrated that metropolitan areas with the highest levels of walkable urbanism are also the most educated and wealthy – as measured by GDP per capita. It also found a strong correlation between community walkability and the attraction and retention of an educated workforce in Pennsylvania's communities. These findings are consistent with what the Brookings Institution identified as "the changing spatial geography of innovation" – one in which walkable communities with multiple modes of transportation are favored by companies creating jobs in high-growth sectors (See "The Rise of Innovation Districts: A new geography of innovation in America," https://www.brookings.edu/essay/rise-of-innovation-districts/).

CREUA's research makes it clear that successful, regionally significant, mixed-use walkable urban places have been proven to be closely correlated with higher GDP per capita, higher per capita incomes, retaining and attracting young people, retaining and attracting educated workers and private investment, improving the tax base and fiscal health of host municipalities, and improvements in public health.

Given the critically important nature of both the Surgeon General's Call to Action, the CREUA research, and Economic Innovation Group research – and the potential they offer to inform policy makers and community development practitioners – 10,000 Friends for this report had commissioned CREUA to conduct similar research, using 2014-15 data, on Pennsylvania's largest ten metropolitan statistical areas (MSAs). The aim of this research is to understand whether a structural shift in favor of more walkable urban development (which appears to be occurring in many metro areas in the country) is also happening in Pennsylvania, and to what extent; to identify the economic, fiscal, job creation, and quality of life benefits of establishing walkable urban centers; and to make recommendations for creating and advancing regionally significant walkable urban places in Pennsylvania.

It is our hope that this report will allow readers to assess the strength of these trends in Pennsylvania, provide a clearer understanding of where the key walkable places in the state are located, and identify which areas and redevelopment strategies have the most potential to help Pennsylvania realize the benefits of better walkable urbanism. In addition to being economic engines, walkable communities promote health and encourage healthy lifestyles. 10,000 Friends hopes this report and the data provided therein will drive smart policy development and strategic public and private investment in plans and projects to help neighborhoods realize the benefits of quality, walkable community design – promoting both community health and economic opportunity for all.

So many of Pennsylvania's smaller cities – with their older downtown areas and traditional neighborhoods – have access to quality building stock, anchor institutions, and public transit service. The challenge that these communities often have is their lack of access to technical capacity and financial resources to leverage these assets in a coordinated and thoughtful manner. They need strategic support and guidance – and public and private reinvestment – informed in part by the information in this report.

Positioning Pennsylvania's communities to attract jobs and talent, while providing opportunity and remaining affordable for long-time residents, will require an intentional strategy that utilizes public-private partnerships to improve our communities. With that in mind, this paper not only presents CREUA's 2014-15 data and findings, but also offers a brief analysis and set of policy recommendations from 10,000 Friends for action at the state and local levels. This white paper and its recommendations can begin a conversation about how the public and private sectors can better work together to revitalize Pennsylvania's older cities and towns, making them healthier and more walkable.

Methodology

In the brief data computations that follow, CREUA identifies regionally significant walkable urban places (WalkUPs) in Pennsylvania's ten largest metro areas, based on an analysis of Walkscore data, satellite aerials, and local input where necessary. WalkUPs are defined as places 500 acres or less in size with average Walkscores of 70 or greater, and at least 1.4 million square feet of office space or 340,000 square feet of retail space. CREUA collected 2014-15 data on the quantity and performance of commercial real estate from CoStar, the country's leadings source of commercial real estate data. Each WalkUP is categorized into one of eight types. These include, for example, downtowns, downtown adjacent places, suburban town centers, and innovation districts, among others.

The quantity of office and retail space in each WalkUP was tabulated. Based on the percentage of the metro region's office and retail space that is located in these walkable urban places, CREUA ranked each metro and explored correlations with per capita GDP and educational attainment. In addition, CREUA analyzed recent office absorption and rent trends in WalkUPs and the quantity of walkable space in the suburbs to produce momentum rankings for the same metro areas as well.

Following the data sections, 10,000 Friends of Pennsylvania then offers its Analysis and provides its Recommendations for increasing and improving great walkable places in Pennsylvania's communities.

Below is a summary of CREUA's methodology used to create these rankings. Data used is from 2015. For more information, see Foot Traffic Ahead: Ranking Walkable Urbanism in America's 30 Largest Metros, June 2014, http://business.gwu.edu/wp-content/up-loads/2016/02/CREUA_Foot-Traffic-Ahead.pdf.

This study determined the geographic locations and size of regionally significant walkable urban places (WalkUPs) in Pennsylvania's 10 largest metropolitan areas. Each is ranked from greatest to least percentage of occupied walkable urban development by square footage as a percentage of the total office and retail real estate products available in that metropolitan area. CREUA then evaluated these WalkUPs compared to the rest of the metro area on economic metrics.

Finding the WalkUPs

The methodology to identify WalkUPs in the 10 largest metros is based on Brookings research. (See: Leinberger. and Alfonzo, "Walk this way: The economic promise of walkable places in metropolitan Washington, DC." The Brookings Institution. Available at www.brookings.edu/ research/papers/2012/05/25-walkable-places-leinberger). This methodology geographically and economically defines WalkUPs and creates a ranking system using metrics of real estate economic performance.

WalkUPs are defined as having the following characteristics:

- Office & retail space

- Office: ≥1.4 million square feet *and/or*
- Retail*:* ≥ 340,000 square feet
- Walk Score*:* Value ≥ 70 at the most walkable intersection

Ranking the Metros

This report provides two distinct rankings of the 10 largest metropolitan areas in Pennsylvania:

- *Existing Ranking:* Based upon the total metro inventory of the following in 2015: office space and retail space.
- Development Momentum Ranking: Based upon the change in WalkUP market share of a metro area's total inventory of the following:
    - Office: Δ in share from Q1 2010 to Q4 2014
    - Multi-Family Rental: Δ in share from Q1 2010 to Q4 2014

Categories of WalkUPs

*There are eight types of WalkUPs, as determined by CREUA's previous research efforts (*See: For GWU research, see http://business.gwu.edu/about-us/research/center-for-real-estate-urban-analysis/research/walkable-urban-places-research/. For Innovation Districts, see http://www.brookings.edu/research/opinions/2014/11/12-urban-innovation-districts-katz-wagner.

1. **Downtown**: The traditional, original downtown center of a metro's central city. Occasionally there are Secondary and Tertiary Downtowns.

2. **Downtown Adjacent**: WalkUPs that cluster around the central city Downtown.

3. **Urban Commercial**: Former local-serving commercial districts in decline during the late 20th century, recently revitalized as regionally significant WalkUPs.

4. **Urban University**: Places where institutions of higher learning have embraced, and are integrated with, their community.

5. **Innovation Districts**: Places where the knowledge-based innovation economy is focused (research, tech-transfer, startups, corporate facilities, etc.), many times growing out of Urban University WalkUPs.

6. **Suburban Town Center**: Eighteenth and 19th-century towns eventually swallowed by larger metro areas and recently revitalized.

7. **Redeveloped Drivable Suburban**: Places originally developed as strip commercial and/or regional malls that have since urbanized.

8. **Greenfield or Brownfield**: WalkUPs developed on undeveloped land or reclaimed land, mainly former industrial uses.

Data Sources

Office & Retail Data: CoStar, the leading provider of office, retail, and multi-family rental data in the U.S. (www.walkscore.com)

Walkability: Walk Score index (www.walkscore.com)

Educational Attainment & Population Data: U.S. Census Bureau American Community Survey 2014 (www.census.gov)

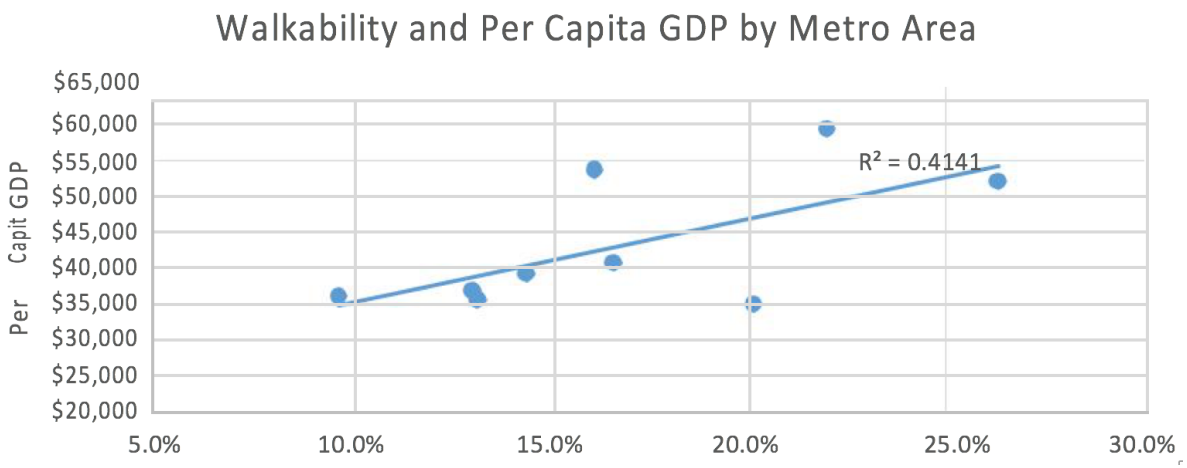
Per Capita GDP: U.S. Bureau of Economic Analysis 2014 (www.bea.gov/regional)

WalkUP Definitions: Further refinement aided by place management organization boundaries (business improvement districts, official government districts, etc.)

Note: The data used in this research is from 2014-2015 unless otherwise indicated. Due to resource constraints and to assess a larger number of metro areas, office and retail data only was used as an imperfect indicator of development trends.

The Data: Identifying Great Walkable Places in Pennsylvania's Largest Metro Areas

	Rank	Population	Office Space in WalkUPs	Retail Space in WalkUPs	Total Space in WalkUPs	Office Space in Region	Retail Space in Region	Total Space in Region	% of Commercial Space in WalkUPs	% of Adults with College Degree	Per Capita GDP	% Growth in Young College Graduates 2005 - 2013 (3-Year ACS)
Pittsburgh	1	2,297,762	56,842,993	14,582,190	71,425,183	129,495,685	141,977,650	271,473,335	26.3%	32.20%	52,053	29.64%
Philadelphia	2	3,930,444	92,690,055	25,316,141	118,006,196	277,455,079	258,893,839	536,348,918	22.0%	34.60%	59,339	25.56%
Erie	3	268,175	3,718,794	1,930,675	5,649,469	9,638,498	18,391,596	28,030,094	20.2%	26.60%	35,053	19.31%
Lancaster	4	512,147	4,873,260	644,733	5,517,993	13,169,467	20,071,367	33,240,834	16.6%	26.10%	40,761	4.07%
Harrisburg-Carlisle	5	533,736	8,081,380	1,558,703	9,640,083	31,549,873	28,214,315	59,764,188	16.1%	29.40%	53,714	19.50%
Allentown-Bethlehem-Easton	6	803,580	6,987,972	2,230,076	9,218,048	28,964,641	35,043,822	64,008,463	14.4%	27.60%	39,194	10.50%
Scranton - Wilkes-Barre	7	542,000	4,436,553	2,534,911	6,971,464	19,070,926	33,867,181	52,938,107	13.2%	23.60%	35,659	11.88%
Reading	8	399,902	3,516,949	889,471	4,406,420	11,691,981	22,116,679	33,808,660	13.0%	22.50%	36,849	1.15%
York-Hanover	9	428,904	2,011,990	819,827	2,831,817	9,894,044	19,403,531	29,297,575	9.7%	21.90%	36,055	3.32%
Total			183,159,946	50,506,727	233,666,673	530,930,194	577,979,980	1,108,910,174	21.1%	27.2%	43,186	13.9%
State College		138,587	12,786,273	813,379	13,599,652	16,640,731	8,235,343	24,876,074	54.7%	41.70%	44,274	6.70%



DEVELOPMENT MOMENTUM RANKING: OFFICE AND RETAIL RENT AND SPACE ABSORPTION STATISICS

		Office				Retail			
Rank	Metro Area	Walkable Absorption Fair Share Index (2010-2014)	Current Walkabout Urban Rent Premium	Change in Walkable Rent Premium Since 2007	Walkable % of Regional Office Absorption	Walkable Absorption Share Index (2010-2014)	Current Walkable Urban Rent Premium	Change in Walkable Rent Premium Since 2007	Walkable % of Region Retail Absorption
1	Philadelphia	0.00	28%	17%	0%	0.00	79%	27%	0%
2	Pittsburgh	0.00	14%	1%	0%	0.23	22%	8%	2%
3	Allentown-Bethlehem-Easton	2.00	-32%	-15%	100%	2.00	-5%	-5%	15%
4	Lancaster	1.64	-24%	-15%	33%	1.22	3%	25%	4%
5	York-Hanover	1.31	-12%	10%	37%	0.60	-14%	-20%	3%
6	Harrisburg-Carlisle	0.00	3%	0%	0%	0.00	0%	-32%	0%
7	Scranton - Wilkes-Barre	0.00	-18%	-28%	0%	1.17	7%	5%	9%
8	Erie	0.00	13%	-43%	0%	0.00	5%	44%	0%
9	State College	0.00	-32%	0%	0%	0.00	32%	-45%	0%
10	Reading	2.00	-45%	-8%	100%	1.05	-57%	-96%	4%

NOTE: If WalkUPs saw more absorption than the metro region total, the FSI was maxed to 2 and the share of regional office absorption was maxed at 100%

WalkUPs seeing negative absorption were given an FSI of 0 and a share of regional absorption equal to 0.

Source: CoStar

ALLENTOWN-BETHLEHEM-EASTON

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburban or Central City
Downtown Allentown	89	3,179,567	1,628,818	Downtown	Central City
Downtown Easton	85	509,405	488,258	Downtown	Central City
Lehigh/South Side	86	3,299,000	113,000	Urban University	Central City
Total		6,987,972	2,230,076		

NOTE: 3,210,000 Estimated Lehigh University non-residential square feet

ERIE

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburban or Central City
Downtown Erie (Imp. District)	91	3,148,219	1,570,675	Downtown	Central City
State St. (South of Downtown)	78	570,575	360,000	Downtown Adjacent	Central City
Total		3,718,794	1,930,675		

HARRISBURG-CARLISLE

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburb or Center City
Downtown Harrisburg	93	6,312,380	926,348	Downtown	Central City
Downtown Hershey/Hershey Park	73	119,000	414,491	Suburban Town Ctr	Suburban
Downtown Carlisle	85	1,650,000	217,864	Suburban Town Ctr	Suburban
Total		8,081,380	1,558,703		

NOTE: 1,650,000 Estimated SF of Dickinson non-residential space

LANCASTER

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburban or Central City
Downtown Lancaster	99	1,741,772	514,510	Downtown	Central City
James Street	92	3,131,488	130,223	Downtown Adjacent	Central City
Total		4,873,260	644,733		

NOTE: 1,500,000 Franklin and Marshall estimated square feet

PHILADELPHIA

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburb or Center City
Center City East	99	17,706,303	4,926,951	Downtown	Central City
Center City W./Rittenhouse	100	28,943,505	3,568,037	Downtown	Central City
Old City	99	1,282,916	1,283,584	Downtown	Central City
Logan Square	99	5,735,465	271,930	Downtown	Central City
Spring Garden	95	4,523,927	721,932	Downtown Adjacent	Central City
Queen Village	98	209,874	1,432,999	Downtown Adjacent	Central City
Society Hill	97	3,803,999	949,227	Downtown Adjacent	Central City
Passyunk Square	97	295,466	1,415,242	Downtown Adjacent	Central City
Graduate Hospital	96	291,067	749,894	Downtown Adjacent	Central City
University City	92	17,284,265	897,362	Innovation District	Central City
Germantown	92	482,784	648,587	Urban Commercial	Central City
Manayunk	92	221,665	468,226	Urban Commercial	Central City
Bella Vista	98	281,082	1,450,761	Urban Commercial	Central City
Northern Liberties	95	420,473	888,381	Urban Commercial	Central City
Temple	90	6,465,793	382,419	Urban University	Central City
Chestnut Hill	88	101,384	389,354	Urban Commercial	Central City
Ardmore	91	281,691	1,058,052	Suburban Town Ctr	Suburban
Downtown Bryn Mawr	78	360,108	512,172	Suburban Town Ctr	Suburban
Downtown Wayne	87	386,204	518,327	Suburban Town Ctr	Suburban
Downtown West Chester	96	1,392,889	697,191	Suburban Town Ctr	Suburban
Downtown Phoenixville	87	157,247	415,954	Suburban Town Ctr	Suburban
Downtown Norristown	81	1,104,185	701,708	Suburban Town Ctr	Suburban
Doylestown	90	699,263	561,441	Suburban Town Ctr	Suburban
Pottstown	86	258,500	406,410	Suburban Town Ctr	Suburban
Total		92,690,055	25,316,141		

NOTES:

10,166,000 Estimated Non-Residential SF Univ. of Pennsylvania
2,212,980 Estimated Non-Residential SF Drexel
6,151,200 Estimated Non-Residential SF Temple

PITTSBURGH

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburban or Central City
Golden Triangle	99	33,008,915	2,481,198	Downtown	Central City
Lower Hill District	82	1,149,878	382,132	Downtown Adjacent	Central City
The Strip	79	1,471,563	618,754	Downtown Adjacent	Central City
Bloomfield	94	993,254	767,606	Urban Commercial	Central City
North Shore	77	4,077,347	640,574	Downtown Adjacent	Central City
Squirrel Hill	93	271,396	521,666	Urban Commercial	Central City
South Side Flats	93	2,871,981	1,915,158	Urban Commercial	Central City
Oakland	95	7,987,427	723,631	Innovation District	Central City
East Liberty	92	1,533,405	1,531,152	Urban Commercial	Central City
Shadyside	93	196,056	467,131	Urban Commercial	Central City
Central Lawrenceville	86	168,451	348,984	Urban Commercial	Central City
Upper Lawrenceville	86	368,483	736,652	Urban Commercial	Central City
Washington	85	808,181	513,507	Suburban Town Center	Suburban
Uniontown	84	347,500	546,869	Suburban Town Center	Suburban
Butler	83	446,966	365,569	Suburban Town Center	Suburban
Wilkinsburg	82	331,678	557,781	Suburban Town Center	Suburban
Swissvale	78	151,442	504,659	Suburban Town Center	Suburban
Dormont	81	113,435	504,659	Suburban Town Center	Suburban
Mt. Lebanon	82	545,635	454,508	Suburban Town Center	Suburban
Total		56,842,993	14,582,190		

NOTES: 1,479,000 SF of university owned office/class/lab space at CMU
2,900,000 SF of class/lab/office space at Univ. of Pittsburgh

READING

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburban or Central City
Downtown Reading	94	2,022,949	889,471	Downtown	Central City
West Reading	88	1,494,000	134,582	Downtown Adjacent	Suburban
Total		3,516,949	1,024,053		

NOTE: SF of Office in West Reading includes the estimated square footage of Reading Hospital, based on a capacity of 711 beds and assuming 2,000 square feet per bed.

SCRANTON-WILKES BARRE

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburban or Central City
Downtown Scranton	91	2,668,632	1,778,028	Downtown	Central City
Downtown Wilkes-Barre	90	1,767,921	756,883	Downtown	Central City
Total		4,436,553	2,534,911		

STATE COLLEGE

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburban or Central City
Downtown State College	95	12,786,273	813,379	Urban University	Central City

NOTE: 12,200,000 Estimated PSU Office/lab/Class Space

YORK-HANOVER

WalkUP Name	Walk Score at 100% Intersection	Office Square Footage	Retail Square Footage	WalkUP Type	Suburban or Central City
Downtown York	93	2,011,990	819,827	Downtown	Central City

Key Findings

Background

10,000 Friends asked the George Washington Center for Real Estate and Urban Analysis (CREUA) to conduct a high-level study of regionally significant walkable urban places in the largest metro areas in Pennsylvania.

This brief review is based on CREUA's original survey in 2014 of walkable urbanism in the largest 30 metro areas in the country, entitled *Foot Traffic Ahead*. That study found strong positive correlations between the overall walkability of the metro area and its per capita GDP, as well as between walkability and the educational attainment of the metro area's population. For example, the average per capita GDP for the top 6 ranked metros, based on walkability, was $60,000, versus $44,000 for the lowest ranked metros. In addition, the study found that, in most metros, office rents were higher in walkable urban places than in drivable suburban locations and that this premium for locating in walkable urban places has been rising. This is an indication of pent-up demand for walkable urbanism.

Key Findings of the Pennsylvania Research

Philadelphia and Pittsburgh are Leaders

Of the 10 metro areas evaluated, Philadelphia and Pittsburgh are the clear leaders in walkable urbanism and are obviously the largest two metros in population in the Commonwealth by a large amount. They have the most walkable urban office and retail space, in terms of both the absolute total and the relative percentage of space in the metro area. They are also the only metros in the state seeing consistent and strong rent premiums for both walkable urban office and retail space. In addition, they are the only metro areas evaluated to have any significant walkable urbanism outside the central city. Finally, both Philadelphia and Pittsburgh contain excellent examples of "Innovation Districts," walkable urban spaces typically anchored by major research institutions or universities, which serve as centers of the modern knowledge economy.

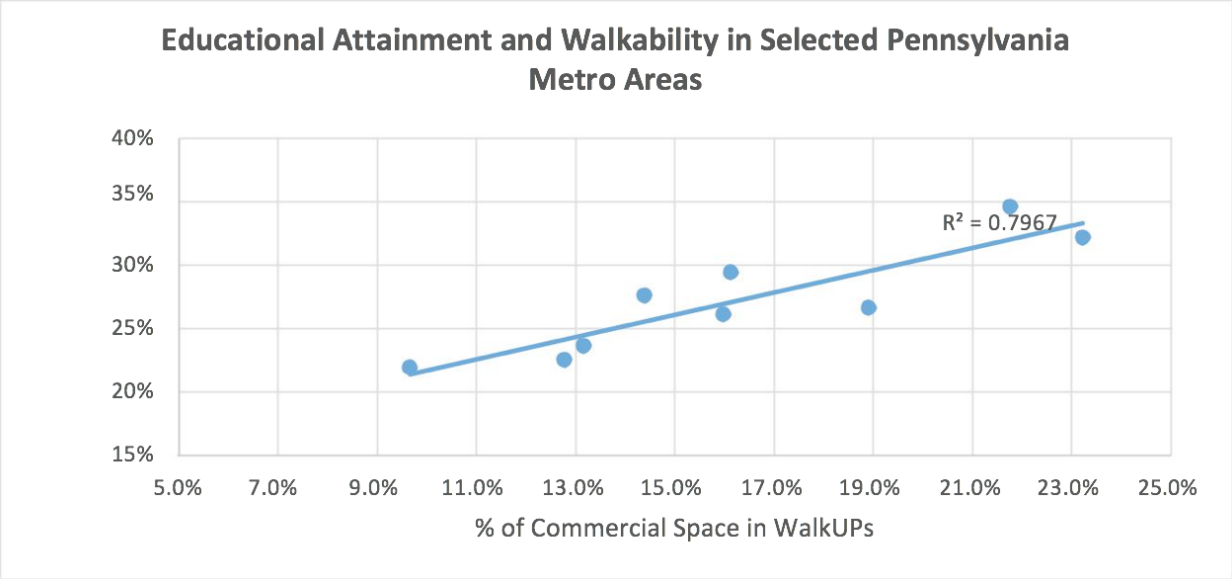
The Economic Performance of Walkable Urban Places Outside of Philadelphia and Pittsburgh is Mixed

With the possible exception of Lancaster and Allentown-Bethlehem-Easton, and also to a lesser degree the City of York, the data suggests that walkups in the remaining metros are not thriving. While Lancaster and Allentown-Bethlehem-Easton can at least point to strong office and retail absorption in their walkups in the current real estate cycle, office rents remain below the average for drivable suburban areas and retail rents are virtually even with drivable suburban rents. The City of York is gaining market share in the office and commercial real estate market relative to other suburban regional locations, and comparative rents are increasing. For the rest of the metro areas, the evidence of economic performance in walkable places is even more mixed, with fewer

positive indicators. Walkable office and/or retail rents are actually lower than the average for drivable suburban areas in most of these metros and absorption has been weak. Many WalkUPs identified in this research are performing negatively on such indicators as space absorption, rental rate premiums, rent trends, and relative market share as compared to suburban locations.

The Correlation between Educational Attainment and Walkability Holds in Pennsylvania – Especially for the Young

Just as CREUA found in Foot Traffic Ahead, there appears to be a strong correlation between the walkability of a metro area (as measured by the % of office and retail space in WalkUPs) and the educational attainment of the metro area's population (as measured by the % of the population with college degrees or higher). In the most walkable metros of Pittsburgh and Philadelphia, 32% to 34% of adults have at least college degrees as compared to 29% for the national average. In the least walkable metros of Reading and York-Hanover, only about 22% of adults have at least college degrees. The R^2 for this correlation is .8 as shown in the chart below, which is considered extremely high correlation.[1] It is important to note that this does not prove causality.



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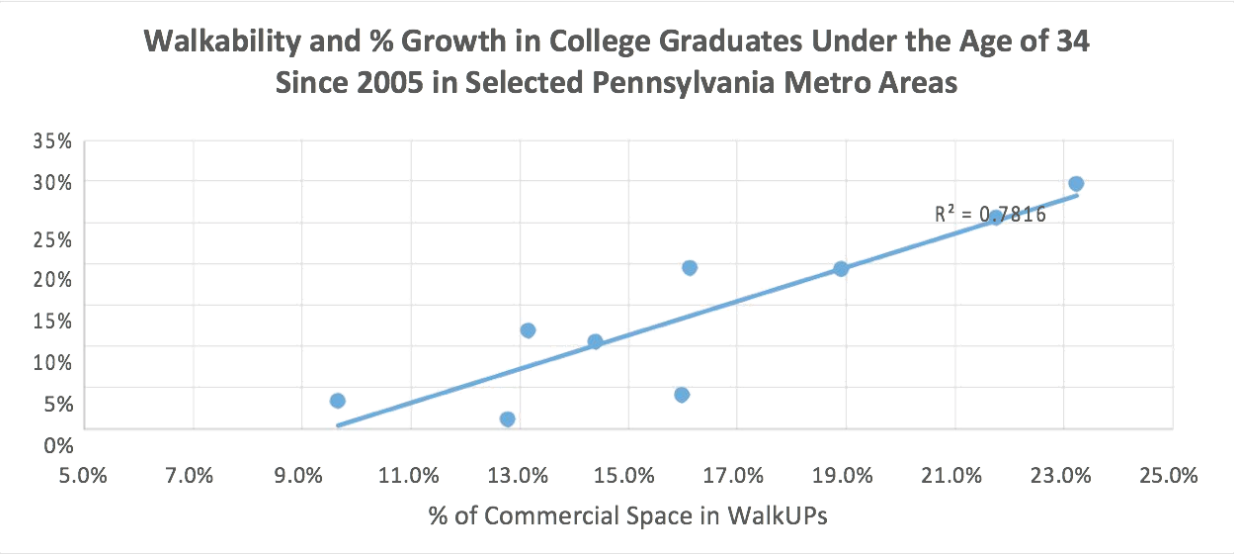
[1] Note that State College was excluded from this analysis because the dominance of the local economy by Penn State University makes it a special case.

The correlation between walkability and the attraction and retention of young college graduates is even more dramatic. From 2005 – 2013, Pittsburgh and Philadelphia saw their numbers of young college graduates (those under 34) grow by 30% and 26% respectively. Of the smaller metro areas, the two ranked the most walkable – Erie, and Harrisburg-Carlisle – saw growth in this population of 20%, roughly consistent with the statewide average. The two ranked the least walkable – York-Hanover and Reading – saw growth of only 3% and 1% respectively. Growth of the young educated population in Allentown-Bethlehem-Easton, Lancaster, and Scranton Wilkes-Barre ranged from 4% to 12%.[2]



The Correlation between Walkability and Increased GDP also Holds in Pennsylvania

Also, as CREUA found in Foot Traffic Ahead, there appears to be a statistically significant correlation between increased Walkability and Increases in Per Capita GDP across the selected metro areas as well. The correlations are not as strong, however, as those of educational attainment. There is a strong correlation (R2=.4141) between the Walkability of a metro area and the Per Capita GDP of that metro. Regions that are more walkable are correlated with higher GDP per capita. The average per capita GDP for the top 6 ranked metros, based on walkability, was $60,000, versus $44,000 for the lowest ranked metros.

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[2]Note that these statistics are based on the 3-year American Community Survey samples from 2005- 2007 and 2011-2013. If the 1-year sample is used, both Lancaster and Scranton would show higher growth in this population.

Implications and Next Steps

The data reviewed to date supports the notion that walkable urbanism is an important factor in the attraction and retention of educated people in Pennsylvania. Philadelphia and Pittsburgh, in particular, appear to be taking advantage of this fact and are successfully growing their populations of young, educated people. More extensive research is needed to try to understand how much of their success can be attributed to walkability, as opposed to other factors, like the population of the metro area. If it holds true that walkable urbanism attracts the young and educated, then that is an important consideration for economic development. Previous research has proven that higher educational attainment drives improvements in per capita GDP.

The remaining metro areas, particularly Reading and York-Hanover, are faring less well in attracting and retaining educated people, which does not bode well for their economic future. Strategies and policies to expand their inventory of walkable urban real estate and improve the performance of their existing walkable areas may be needed.

Analysis

10,000 Friends of Pennsylvania offers its Observations in Promoting Healthy & Walkable Places in Pennsylvania's Core Communities

The data presented in this paper demonstrate again the benefits of more walkable communities — great walkable places are correlated with an educated workforce and increased Gross Domestic Product (GDP) per capita.

Recent national research has demonstrated that America's New Economy is starkly and increasingly concentrated geographically (See "The New Map of Economic Growth and Recovery," Economic Innovation Group). In the last ten years and continuing today, the recovery and our New Economy is increasingly divided geographically – with a few places that are big winners, many more places that are treading water, and high number of places increasingly in danger of being left behind (See "Geographic Inequality is Swallowing the Recovery," CityLab, 2016, www.citylab.com). At the same time, the U.S. Surgeon General has issued a call to action to promote walkable communities, as public health research has established that walkable communities make residents healthier by reducing obesity and a range of related chronic diseases (See Appendix A).

City and Metropolitan Size Matters

Many locations in Pennsylvania's smaller cities do not meet the minimum total occupied square footage of office and retail space requirements that research indicates is required to be a regionally significant economic driver. Even among the 60 WalkUPs identified in Pennsylvania, over 75% of the WalkUP commercial square footage, and almost 80% of the total WalkUP retail square footage, is in just the Philadelphia and Pittsburgh metropolitan regions.

Higher Educational Attainment by the Metropolitan Population, as exists in Pennsylvania WalkUP communities, is Critical to the Future Economic Success of the Commonwealth

As indicated by both the correlations revealed by this research and numerous other reputable studies, attracting and retaining a highly-educated population and workforce is positively associated with higher local per capita incomes (through better-paying jobs and careers), a higher per capita Gross Domestic Product (GDP), and a higher productivity of the workforce (See "What Matters to Metros: Foundational Indicators for Economic Competitiveness," Fund for Our Economic Future; http://www.thefundneo.org/what-matters/what-matters-metros).

National Trends indicating Significant Momentum for Walkable Places in large cities is not seen in Many of Pennsylvania's Smaller Metropolitan areas

Philadelphia, Pittsburgh, the Allentown-Bethlehem-Easton, Lancaster, and to a lesser degree downtown York are the only regionally significant WalkUPs in Pennsylvania identified by this research that have the private real estate market momentum as would be evidenced by square foot of space absorption data and rental rate premiums.

10,000 Friends' Observations on private Office and Retail Rental Markets in Pennsylvania Smaller Cities (given the 2007-2015 data):

Allentown-Bethlehem-Easton

- Region has strongest downtown space absorption statistics in the state, as WalkUPs saw more absorption than the metro region total for both office and retail space.
- Region has the highest rates of new office and retail space being located and occupied in walkable locations.
- Downtown locations in region are gaining market share, though rent premiums are negative in WalkUP space in total.
- Lehigh University is of critical importance to South Side of Bethlehem; its footprint provides over 90% of commercial space usage – and presents a good opportunity to build an Innovation District ecosystem.

Lancaster

- Downtown Lancaster is the only other region that has gained market share versus suburban locations for both commercial and retail space. It is the second strongest small city real estate market performance.
- City has committed to and made downtown walkability and "green infrastructure" investments, including in green space and in adjacent neighborhoods, which have been paying off based on our read of the data.
- Retail rents in downtown locations are increasing at a much faster rate – and are now at a premium – versus suburban locations, as downtown specialty retail appears to be developing a successful niche.
- Franklin & Marshall University investments have been a critical driver in the James Street district adjacent to downtown.

York-Hanover

- City of York downtown is the only qualifying WalkUP in the region. Further, the City of York's population is dwarfed by the full metropolitan population, resulting in suburban trends affecting regional statistics.
- York downtown office and commercial space is gaining significant market share of total occupied space in the region, versus suburban locations. Walkable office locations are also seeing increasing rent price trends.
- Small retail space trends in downtown, though seeing some net positive absorption, is weaker than that in the region's suburban locations.

- Planned Northwest Triangle Innovation District holds promise, particularly for advanced specialty manufacturing give York's history.
- Sprawling land uses that have diffused the population is a significant issue for the region, and the strategy of concentrating assets and investments in walkable locations is important here.

Harrisburg-Carlisle-Hershey

- Downtown walkable space in the region has seen negative absorption, indicating a loss of the total amount of such occupied space.
- State government in Harrisburg is a critical driver of the office market in the region, and underpins the stable parity seen in the office market in downtown and suburban locations.
- There was also a negative absorption of retail space in the region as well, with rents losing ground relative to suburban retail locations.
- Dickinson University non-residential space usage is a critical support to the downtown Carlisle market.

Scranton-Wilkes-Barre

- Office market trends in downtown walkable space in the region have been negative, including negative net absorption of occupied space, office rents at a premium in suburban locations, and relative rent trends negative for downtown space versus suburban space.
- Downtown WalkUP retail market is stronger and appears stable, with downtown locations gaining retail space market share versus more suburban locations, with small and stable rent premiums as well.
- Further partnerships with WalkUP universities, University of Scranton and Wilkes University, could advance WalkUP concepts.

Erie

- Negative occupied space absorption in the downtown WalkUPs for both office and retail space, which is a significant concern.
- Erie does have notable office rent premium in the downtown WalkUPs, however, likely due to the important institutions and drivers located in the WalkUP—including City and County governments, hospitals, Erie Insurance, and Gannon University. The relative rent premium downtown, however, has been slipping versus suburban locations during the years studied.
- Retail rents in walkable downtown locations have also been at small premium to suburban locations.
- Strategies to expand and concentrate office uses in walkable downtown locations are needed; the ongoing downtown campus and redevelopment initiative led by Erie Insurance is of critical importance.

State College

- Downtown State College Borough, the only identified regionally significant WalkUP location, has also suffered from negative space absorption for both the commercial and retail markets.
- Retail rents in downtown State College are at a significant premium to the suburbs, despite negative space absorption, as downtown retail space appears to

fill a community serving retail niche. In the years studied, retail rent premium in WalkUP appears to be slipping compared to suburban locations as well.

- Downtown office space market is less healthy, with negative absorption, and serious and stable rent price discounts to office park and suburban space.
- Penn State University is obviously key and critical to the downtown future, and important to the office market as well. Will Penn State commit to locate and occupy facilities, office space, and lab/research space in the walkable borough downtown, or will they pursue an increasingly dated suburban model?
- As Penn State is the third largest research university in the state, downtown State College is the best opportunity in the Commonwealth for greater Innovation District implementation by better connecting university professional space needs in a walkup location.

<u>Reading</u>

- Reading unfortunately appears to suffer from the weakest WalkUP rent comparisons of any of these metros for both office and retail space — and recent trends still weakening.
- Though a challenging environment, both office and retail space absorption are positive at the same time prices and price trends are weak. This may suggest weakness throughout the region or price sensitive tenants.
- Reading is a critical location to focus redevelopment improvements on the public realm while expanding public-partnerships with important regional institutions – the Berks Alliance holds promise in this respect.
- Institutions such as Reading Hospital are important institutional anchors to build upon.

It is clear that Pennsylvania's older cities cannot afford to wait for private markets to be the engine that seeds the development of Walkable urban places. Policies and projects to expand the inventory of walkable urban real estate and improve the existing walkable areas are needed in Pennsylvania and discussed in the Recommendations section that follows.

It is important to note that in 2018, building great walkable communities is not only a great community development strategy, but also is very much a job creation/economic development strategy as well. In decades past, workers of all backgrounds and education levels would willingly relocate to "wherever the job was" or wherever the employer sent them. However today, many workers, and young people in particular, will choose the place they want to live first—based on the amenities and quality of life offered—and then build a career and a life in that community.

National research from not only CREUA, but also the Economic Innovation Group, show that job, economic, and population growth is increasingly being concentrated in a small number of places, while most locations across the country are either stagnant or losing ground relative to their peers. The most successful locations are those that have a high concentration of highly educated workforce, knowledge workers, and innovation. As one would intuitively expect, the data shows that Philadelphia and Pittsburgh rank very high, with more – and more thriving – walkable places than other metro regions.

With a few notable exceptions, the data showed that outside of Pittsburgh and Philadelphia, Pennsylvania's regionally significant WalkUPs in smaller metro regions simply are not thriving. In fact, the data shows that they largely lack positive private real estate market momentum (are losing commercial space market share to suburbs, rents may be declining, and/or there is no downtown rental rate premium versus suburban locations). The good news is that five of our top ten metro regions were showing positive momentum in WalkUP development. In addition to Philadelphia and Pittsburgh, Allentown-Bethlehem-Easton, Lancaster and York-Hanover all showed growth.

Overall, these results are stark, and sound a wake-up call for new focus and planning on how to promote walkable communities beyond the Philadelphia and Pittsburgh metro regions that can produce thriving Healthy & Walkable places and the accompanying economic benefits.

Multiple studies, including data from CREUA, have proven that the attraction, retention, and development of a highly educated workforce is significantly correlated with increased per capita income, increased GDP, and increased productivity (See "What Matters to Metros: Foundational Indicators for Economic Competitiveness," Fund for Our Economic Future; www.thefundneo.org and CREUA's *Foot Traffic Ahead* reports in 2014 & 2016). Importantly, GWU simultaneously found in their Pennsylvania data that the strong positive statistical correlation between WalkUPs and the attraction and retention of talent and highly educated young people — found nationally—also <u>does</u> hold true in Pennsylvania, even given many of our WalkUPs' mixed economic performance.

Given that attracting talent and the highly educated is correlated with job, economic and income growth, and given that data proves that in Pennsylvania attracting a highly educated workforce is very significantly correlated with WalkUPs as defined by GWU, we believe therefore that it is critical for Pennsylvania to both improve and increase its supply of walkable urban places.

However, given the lack of market demand and momentum in most smaller PA WalkUP metros as evidenced in GWU's findings, it makes the most sense for PA communities to focus on their public realm as a practical, achievable first step in: (a) increasing walkability to improve neighborhood quality of life, and (b) to cluster walkability assets near leading institutions and non-profits (such as Universities and hospitals, etc.) to maximize economic growth potential of major economic assets and drivers. This public realm of course includes publicly owned lands, facilities and other public assets that can be improved without leading private investment but with visible results which can spur further reinvestment and redevelopment.

Strengthening and improving Healthy & Walkable places as a community /neighborhood development strategy

We recommend that communities focus on public improvements such as parks, trails, greenways, playgrounds, streetscapes, Complete Streets initiatives, pedestrian and bike safety improvements, and removing blight. This is consistent with 10,000 Friends Healthy Communities initiative and twelve community development modalities (See

Appendix B) through which these public enhancements not only promote walkability and quality of life, but also make the community healthier as described by the Surgeon General. These foundational improvements can help begin to attract new residents and prompt more real estate and commercial investment.

Strengthening and improving Healthy & Walkable places as a job and economic growth strategy

CREUA has identified "*Innovation Districts*" as one of the eight different types of WalkUP developments. Innovation Districts are places where the knowledge-based innovation economy is focused (research, tech-transfer, startups, high-tech, advanced manufacturing, creative & art industries, corporate HQ, etc.), many times growing out of Urban University WalkUPs (places where institutions of higher learning have embraced, and are integrated with, their community). Innovation Districts are the type of WalkUP most likely to attract and cluster knowledge workers, with advanced degrees, and companies and firms focused on innovation; and thus, have critical potential to drive economic growth, job creation, and higher per capita incomes.

First developed by the *Brookings Institution*, the concept of the Innovation District encompassed a range of assets and improvements needed to spur successful innovation and maximize the commercial "spin-off" potential of universities, hospitals, and major employers (See "The Rise of Innovation Districts: A new geography of innovation in America," https://www.brookings.edu/essay/rise-of-innovation-districts/). Concentrating those assets geographically in close proximity, along with community walkability improvements, forms the Innovation District WalkUP.

10,000 Friends recommends that those localities with significant economic assets (such as Universities, private colleges, major hospitals, research labs/facilities, and/or major employer or company regional HQ), should prioritize the creation of an Innovation District WalkUP by geographically clustering walkability improvements near those economic assets. This not only forms the basis for an evidence-based economic growth strategy but is a practical first step in those cities without many or any deep pocket private companies, where walkability and greening improvements can be made while advancing a partnership with leading local non-profit institutions (such as universities, hospitals, even courthouses). These are achievable and visible enhancements. Simultaneously and in the same concentrated location, municipal and civic leadership can focus on the same kind of public improvements to make the burgeoning new Innovation District more walkable (adding and improving parks, playgrounds, streetscapes, Complete Streets, pedestrian/bike trails and greenways, etc.).

The concept of Innovation Districts continues to grow in significance, and the Brookings Institution continues to be a leader in researching its economic potential. 10,000 Friends is citing Brookings' Innovation District work and is providing, as Appendix C, "Elements of the Pennsylvania Innovation District Ecosystem," a resource closely adapted from Brookings' work to help Pennsylvania communities identify the elements and assets necessary to create a fully functioning Innovation District that can realize the synergistic benefits of the entrepreneurial knowledge economy.

Finally, given the highly fragmented local government structure in Pennsylvania, 10,000 Friends recognizes that many communities with the potential to benefit from this research lack the size, staff, and capacity to implement these strategies on their own. To address this reality, 10,000 Friends has launched its "Healthy & Walkable Communities" program to assist communities in visioning, planning, and implementing healthier and more walkable communities in the Commonwealth.

In the following section, 10,000 Friends offer a series of recommendations for our institutions, public officials, and civic leaders at all levels, which can help Pennsylvania's cities and core communities move forward.

Goals & Recommendations

Promoting Healthy & Walkable Places in Pennsylvania's Core Communities

10,000 Friends' Over Arching Goals:

A. **Make Pennsylvania's communities more walkable**
   - Public investments in housing, retail, public space, greenspace, and public infrastructure should be made to increase walkability.
   - Better connect all Pennsylvanians to economic opportunity by promoting and investing in quality multi-modal transportation options.
   - Promote inclusive growth and social equity by reinvesting and reconnecting nearby distressed neighborhoods using walkability and mixed-income strategies.
   - Focus on health — walkable, active places increase physical activity and reduce rates of obesity, diabetes, heart disease, and related diseases.

B. **Adopt the 'Innovation District' concept as a priority economic development and job creation strategy**
   - Innovation Districts can grow the economy, increase GDP, increase per capita income, and promote entrepreneurial opportunity in Pennsylvania.
   - The elements of a successful Innovation District as described in these recommendations are adapted from "*The Rise of Innovation Districts: a new geography of innovation in America,"* the Brookings Institution.
   - Build more Innovation Districts where communities have a critical mass of the necessary assets and elements of the Innovation District Ecosystem (See both Appendix C and Appendix D for more details).
   - Successful Innovation Districts require great walkable communities.

C. **Ensure that redevelopment and revitalization improvements promote Social Equity**
   - Promote inclusive growth and social equity in all walkable urban neighborhoods by revitalizing and reconnecting nearby distressed neighborhoods.
   - Provide both affordable and market-rate units, across a full spectrum of price points, promoting a range of mixed-income housing opportunities.
   - Ensure that revitalizing WalkUP communities remains affordable to longtime residents by employing anti-displacement and inclusionary zoning strategies.
   - Better connect all Pennsylvanians to economic opportunity by promoting and investing in quality multi-modal transportation options providing access to important destinations including educational and job opportunities.
   - Develop infill housing units of various types that provide both rental and home ownership opportunities.

The following recommendations outline strategies for high-impact state public investment in building WalkUPs that create healthy, walkable, innovative communities in Pennsylvania, consistent with smart growth land use.

10,000 Friends' Recommendations for the Commonwealth

1. **The Commonwealth should adopt an "Investment Philosophy" of "Promoting Healthy, Walkable, Innovative Core Communities" throughout the Commonwealth and use this philosophy to prioritize Commonwealth investments. The Commonwealth investment philosophy should:**
    - Be guided by the Keystone Principles for Growth, Investment, and Resource Conservation In developing this new policy Capitalize on the market opportunity provided by changing demographics and preferences of Millennials and retiring Baby Boomers.
    - Focus investments on walkable, historic and traditional neighborhoods, small towns and downtowns, university districts, third class cities, large urban centers, Act 47 communities, and areas with a disproportionate concentration of poverty.
    - Coordinate all state agency program and project funding awards accordingly. Unless investments are strategically coordinated, there is risk that precious program funds could be wasted, or even worse, that some awards could work directly against the stated Investment Philosophy (goal of making investments in walkable and innovative communities). Transportation and public infrastructure decisions and investments are critical; private development will often follow public infrastructure investments.
    - Data and metrics should be developed and used to help prioritize and target places and projects that best implement the state's Investment Philosophy.
    - To ensure successful implementation of the Keystone Principles by state agencies, a numeric metric should be developed and used to "quality control" state agencies' project selections and awards. A good such metric, for example, could be "Local incremental property tax yield/ per acre of land used by a proposed development project."

2. **The Commonwealth should focus on improving the walkability of Pennsylvania's communities:**
    - Improving community walkability can create public health benefits and unleash the job-creation potential of Innovation Districts. But walkability alone is not enough – Pennsylvania should incentivize and link walkability investments with neighborhood investment — in housing, retail, public space, open space, business assistance, and public infrastructure.
    - Promote inclusive growth and social equity in revitalizing walkable communities by regenerating and reconnecting nearby distressed neighborhoods.
    - Promote a range of mixed-income housing opportunities, encourage inclusionary zoning, increase transportation options in underserved

neighborhoods. This multi-modal transportation investment should be based on Complete Streets policies and include transit service and stop improvements, streetscaping improvements, street grid investment, walking and bicycling infrastructure, bike/pedestrian safety investments, and investigate the possibility of adding local bus rapid transit, circulators, or street cars.

3. **The Commonwealth should aim to create and expand "Innovation Districts" as a priority economic development strategy:**
    - Innovation Districts will create new "home grown" companies and jobs, encourage entrepreneurship, maximize the value of our extensive network of higher educational institutions, and capitalize on our rich fabric of quality cities and towns offering an excellent quality of life.
    - Innovation Districts can grow our economy, create good-paying jobs, retain our young people, and increase Pennsylvania's Gross Domestic Product per capita. A key task will be to identify and select from among them the ones with the most potential.
    - Entrepreneurship, business assistance (incubators and accelerators), and startup assistance are important to job growth. Brookings research shows that the value of these resources is maximized if they are clustered geographically near major regional economic drivers, as per the Innovation District concept.

4. **Action Steps to begin Promotion and Implementation of Innovation Districts in Pennsylvania:**
    - *Build a collaborative leadership network* for each Innovation District from among the leaders of key institutions and economic assets that have been identified in the respective potential Innovation Districts.
    - *Identify key existing Innovation District assets* for each existing or prospective District, using the methodology as adapted from the Brookings Institution (See Appendix C, "*Elements of the Pennsylvania Innovation District Ecosystem*").
    - *Prioritize the development of assets each Innovation District currently lacks,* including economic, neighborhood, business assistance, physical, and networking assets (See Appendix D, "Pennsylvania WalkUP Innovation Districts Asset Inventory Matrix.").
    - *Research Spending at Universities Located in WalkUPs.* One important building block of successful Innovation Districts is the presence of a university in a walkable urban location, especially a research university that conducts a significant amount of government or private funded research.

Research Spending at Universities Located in Walkable Places

Metro	WalkUP	University	Total R&D Expenditures (Dollars in Thousands, 2016)
Philadelphia	University City	University of Pennsylvania	$1,296,429
Philadelphia	University City	Drexel University	$127,909
Philadelphia	Temple	Temple University	$246,392
Philadelphia	Center City East	Thomas Jefferson University	$122,396
Pittsburgh	Oakland	University of Pittsburgh	$889,793
Pittsburgh	Oakland	Carnegie Mellon University	$319,168
Pittsburgh	Lower Hill District	Duquesne University	$17,089
Allentown-Bethlehem	Lehigh/South Side	Lehigh University	$32,941
Erie	Downtown Erie	Gannon University	$248
Lancaster	James Street	Franklin and Marshall	$3,772
Harrisburg-Carlisle	Downtown Carlisle	Dickinson	$1,332
State College	State College	Penn State University	$825,561
Scranton-Wilkes-Barre	Downtown Scranton	University of Scranton	$251
Scranton- Wilkes-Barre	Downtown Wilkes-Barre	Wilkes University	$248

Source: CREUA; also https://ncsesdata.nsf.gov/herd/2016/html/HERD2016_DST_06.html

5. **State agencies should adopt a place-based orientation and process for investing in communities:**
    - We recommend that the Commonwealth create or re-create mechanisms to allow agencies to work together to bring to bear their respective assistance to a community — focusing on a specific, asset-rich place within a community, and coordinating and targeting state investments to improve walkability. This would be a targeted, focused, small area (i.e., Innovation District, downtown, transit-oriented development, historic neighborhood, waterfront district, college town or community immediately adjacent to university, etc.).
    - This research shows, that to be effective, public investments should not only be focused on walkability and innovation but must also be concentrated in particular places that are 500 acres or less in size.

6. **The Commonwealth should increase the annual amount of the state's Neighborhood Assistance Program (NAP) tax credit:**
    - Neighborhood Assistance Program (NAP) tax credits are already being used effectively to invest in communities and important community organizations, provide critical social services, and incentivize the development of walkable real estate and walkable communities.
    - Neighborhood Assistance Program (NAP) projects represent real public-private partnerships that are benefitting Pennsylvania's communities.

10,000 Friends' Recommendations for Communities

1. **Develop a Vision for the Future of your Community consistent with the Healthy & Walkable Places and Innovation Districts frameworks:**
    - Engage the community in a visioning session that defines short-term, medium-term, and long-term goals.
    - Prepare an action plan, dynamic in nature, which serves as an organizing document for community stakeholders, prioritizes immediate versus longer-term projects, and communicates key information to potential partners.

2. **Identify and Inventory your Community's unique economic assets and amenities:**
    - Conduct a basic conditions assessment that highlights existing economic assets and amenities and their characteristics.
    - Conduct a basic conditions assessment of housing stock building conditions to target areas for aggressive blight removal strategies.
    - Collect data on existing employment, economic output, and other important indicators.

3. **Form Collaborative Partnerships with Anchor Institutions in your Community (universities, colleges, hospitals, major employers, etc.):**
    - Review the current Community Needs Assessment from any local hospitals.
    - Review the Campus Plan of any local college or university to learn physical plant plans of these institutions.
    - Create task force or working group to define opportunities for growth and expansion of these Anchor Institutions that are consistent with the Walkable Places and Innovation Districts framework.

4. **Seek technical assistance in helping implement your Community's priority projects:**
    - The Commonwealth's well-documented fragmented local government structure means that many communities lack the resources and staff to execute their priority projects.
    - Communities should seek out technical assistance, including from state agencies' regional offices or resources such as 10,000 Friends' Healthy & Walkable Communities initiative.

Recommendation for Largest Cities

The largest cities, Philadelphia and Pittsburgh, should focus on Social Equity issues:

- Ensure that thriving and revitalizing great walkable communities remain affordable to longtime residents by employing anti-displacement and inclusionary zoning strategies.
- Promote access to jobs for longtime residents.
- Invest in quality public transit to improve connectivity and access to opportunity.

Recommendation for Smaller Cities

Smaller cities should focus on the public realm and improving the quality of life for existing residents:

- Prioritize public improvements such as parks, playgrounds, trails, green space, streetscapes, and pedestrian improvements.
- Aggressively combat blight and assemble land.
- Build on existing assets and cluster new assets in close geographic proximity to existing assets. More specifically, where practical, cluster walkability improvements around institutions, public buildings, and business centers.
- Seek public investment from county, state, and federal sources.
- Seek technical assistance in strategizing and executing priority projects.

Appendix A

Excerpt from "Step It Up!" For full report and Executive Summary, please see: https://www.surgeongeneral.gov/library/calls/walking-and-walkable-communities/exec-summary.html

Step It Up! The Surgeon General's Call to Action to Promote Walking and Walkable Communities

Executive Summary

One out of every two U.S. adults is living with a chronic disease, such as heart disease, cancer, or diabetes.[1] These diseases contribute to disability, premature death, and health care costs.[2,3] Increasing people's physical activity levels will significantly reduce their risk of chronic diseases and related risk factors.[4,5] Because physical activity has numerous other health benefits—such as supporting positive mental health and healthy aging—it is one of the most important actions people can take to improve their overall health.[4,5]

Step It Up! The Surgeon General's Call to Action to Promote Walking and Walkable Communities recognizes the importance of physical activity for people of all ages and abilities. It calls on Americans to be more physically active through walking and calls on the nation to better support walking and walkability. Improving walkability means that communities are created or enhanced to make it safe and easy to walk and that pedestrian activity is encouraged for all people.[6] The purpose of the *Call to Action* is to increase walking across the United States by calling for improved access to safe and convenient places to walk and wheelchair roll and by creating a culture that supports these activities for people of all ages and abilities.

The *Call to Action* includes five strategic goals to promote walking and walkable communities in the United States: make walking a national priority; design communities that make it safe and easy to walk for people of all ages and abilities; promote programs and policies to support walking where people live, learn, work, and play; provide information to encourage walking and improve walkability; and fill surveillance, research, and evaluation gaps related to walking and walkability. Action by multiple sectors of society, as well as by families and individuals, will be needed to achieve these goals.

Physical Activity: An Essential Ingredient for Health

Being physically active is one of the most important steps that people of all ages and abilities can take to improve their health.[5] Increasing people's physical activity level will significantly reduce their risk of chronic disease and premature death and support positive mental health and healthy aging.[4,5]

Chronic Disease in the United States

Chronic diseases are the leading causes of death in the United States and major contributors to disability.[3] In 2012, almost 50% of U.S. adults, or 117 million people, were living with a chronic disease, and of this group, about 60 million were living with two or more chronic diseases.[1] Chronic diseases also ranked as four of the top five most costly medical conditions.[7]

Benefits of Physical Activity

Physical activity can reduce illness from chronic diseases and premature death.[4,5] Regular physical activity helps prevent risk factors for disease (such as high blood pressure and weight gain) and protects against multiple chronic diseases (such as heart disease, stroke, some cancers, type 2 diabetes, and depression).[4,5] In children and adolescents, physical activity can improve bone health, cardio respiratory and muscular fitness, and body composition.[4,5]

People living with chronic disease also benefit from being physically active.[4,8-20] For example, physical activity can lessen the severity of their condition, as well as prevent disease progression and premature death,[4,12-16] help manage or reduce symptoms,[8-11] and improve mobility.[13,16]

Among adults, physical activity is associated with improved quality of life,[4,21,22] emotional well-being,[4,23,24] and positive mental health.[4,23-25] Regular physical activity is also important for healthy aging[5] and may delay the onset of cognitive decline in older adults.[4,26-28]

In children and adolescents, some evidence suggests that physical activity can lower levels of anxiety and depression.[4,29-31] When schools encourage participation in physical activity as part of physical education, recess, classroom lessons, or extracurricular activities, students can also improve their academic performance.[32,33]
Physical Activity Guidelines for Americans

To obtain substantial health benefits, the *2008 Physical Activity Guidelines for Americans* recommends that adults get at least 150 minutes of moderate-intensity aerobic physical activity or 75 minutes of vigorous-intensity physical activity, or an equivalent combination, each week and that children and adolescents be active for at least 60 minutes every day.[5] People who are inactive and those who do not yet meet the guidelines are strongly encouraged to work toward this goal. Adults with disabilities who are unable to meet the guidelines should avoid inactivity and try to get regular physical activity according to their abilities.[5]

Physical Activity in the United States

Despite the health benefits, only one-half of U.S. adults reported levels of physical activity consistent with the guideline for aerobic physical activity in 2013.[34] Adults who were male, younger, white, or Asian or who had higher levels of education were more likely to have met the aerobic physical activity guideline.[34] Only 27% of high school students reported levels of physical activity that met the guideline for 60 minutes of physical activity a day in 2013. [35] Male high school students and students in lower grade levels were more likely to meet the guideline.[34,35]

Why Focus on Walking as a Public Health Strategy?

Strong evidence exists that physical activity has substantial health benefits. People can get these benefits through brisk walking or by adding brisk walking to other physical activities. Walking is an excellent way for most Americans to increase their physical activity. It is also a powerful public health strategy for several reasons.

Walking does not require special skills, facilities, or expensive equipment and is an easy physical activity to begin and maintain as part of a physically active lifestyle. Most people are able to walk, and many people with disabilities are able to walk or move with assistive devices, such as wheelchairs or walkers. Walking has a lower risk of injury than vigorous-intensity activities. Walking also may be a good way to help people who are inactive become physically active because walking can be easily adapted to fit one's time, needs, and abilities.

Walking is a common form of physical activity. In 2010, more than 60% of adults reported walking 10 minutes or more in the past week for transportation or leisure. Adults with more education, those who were white or Asian, and those who were younger were more likely than their counterparts to report any walking.
People walk for many purposes, such as for transportation to get to school, work, a store, or the library or for leisure to have fun, socialize with friends or family, walk their dog, or improve their health. Because walking is multipurpose, it provides many opportunities for people to incorporate physical activity into their busy lives. In 2010, about half of U.S. adults reported walking during their leisure time and less than one-third reported walking for transportation.

Communities can benefit when they implement strategies that make them more walkable and when more people walk. Communities designed to be walkable can improve safety not only for people who walk but for all community members. Walkable communities and communities where more people walk offer opportunities for personal interaction and social involvement. Communities designed to be walkable have the potential to reduce air pollution and greenhouse gases because people may choose to walk or bike rather than drive. Finally, walkable communities are attractive places for businesses to locate, which may help local economies thrive.

Why Don't People Walk More?

Many more people could meet the *2008 Physical Activity Guidelines for Americans*[5] by starting to walk or increasing the amount they walk. Although walking is a popular form of physical activity and can be easily done by most people, barriers to walking do exist. People report lack of time as one challenge that prevents them from walking or doing other kinds of physical activity. People may struggle to meet the current guideline for regular aerobic physical activity as they cope with competing demands of work, school, home, and caring for themselves and others.

Safety concerns can be a barrier to walking. Several factors can influence pedestrian risk, such as unsafe driver and pedestrian behaviors and challenging physical environments. Perceived traffic dangers may also be barriers to walking. In surveys of parents, the most commonly reported barrier for walking to school was distance to school, followed by traffic-related dangers. Fear of crime or perceptions of an unsafe neighborhood may also be potential barriers to walking.

In addition, the ways in which communities are designed and built can present barriers to walking. When everyday destinations are located too far away from home, walking will not be a convenient option. Because people are more likely to walk when they use public transportation, the lack of an adequate public transit system may mean that opportunities to walk are lost.

Disability, chronic conditions, and age can be barriers to walking. During 2009–2012, 11.6% of U.S. adults aged 18–64 years reported a disability, and adults with disabilities were more likely to be physically inactive than adults without a disability. Chronic conditions and age can make it difficult for people to walk. For example, people with arthritis may find walking painful. Older adults and those who are frail may be reluctant to walk because of concerns about falls and subsequent injury.

How to Increase Walking and Improve Walkability

Ultimately, individuals make the decision to walk. However, the decision to walk can be made easier by programs and policies that provide opportunities and encouragement for walking and by improvements to community walkability. Improving walkability means that communities are created or enhanced to make it safe and easy to walk and that pedestrian activity is encouraged for people of all ages and abilities.

Community and street design policies are recommended approaches for increasing physical activity, including walking. Community design can support physical activity, for example, by locating residences within short walking distance of stores, worksites, public transportation, essential services, and schools and by building and maintaining sidewalks or paths between destinations that are well-connected, safe, and attractive. Street design can also support walking and enhance pedestrian safety through measures that improve street lighting and landscaping and reduce traffic speed. Transportation and travel policies and practices that create or enhance pedestrian and bicycle networks and expand or subsidize public transit systems can be another approach to encourage walking for transportation.

Several program and policy strategies are recommended to increase physical activity, including walking. For example,

- ***Creation of or Enhanced Access to Places for Walking with Informational Outreach.*** Creating or enhancing access to places for physical activity, combined with information to encourage use of these places, is a strategy recommended to increase physical activity. Examples of places for walking include public parks; health, fitness, and recreational facilities; schools, colleges, and universities; malls; senior centers; and worksites.
- ***Social support interventions.*** Social support interventions increase physical activity by providing supportive relationships for behavior change. They include actions that provide friendship and support, such as buddy systems, contracts with others to complete specified levels of physical activity or walking groups.
- ***Individually-adapted health behavior change programs.*** These programs teach behavioral skills that help participants incorporate physical activity into their daily routines. Programs usually incorporate some form of counseling from a health professional or trainer to help participants set physical activity goals, monitor their progress toward these goals, seek social support, and use self-reward to reinforce progress.
- ***Community-wide campaigns.*** A community-wide campaign is a concentrated effort to promote physical activity that combines a variety of strategies such as media coverage, risk factor screening and education, community events, and policy or environmental changes.

What Sectors Are Needed to Help Implement Community Approaches?

Many groups have a role to play to make the United States a nation with safe, easy, and desirable places to walk as part of our daily lives.

Transportation, Land Use, and Community Design

Decisions and plans made by the transportation, land use, and community design sector can affect whether communities and streets are designed to support walking. This sector can change the design of communities and streets through roadway design standards, zoning regulations, and building codes and improve the pedestrian experience through landscaping, street furniture, and building design. This sector is also integral to the planning and implementation of public transit systems.

Parks and Recreational and Fitness Facilities

Public parks offer access to places to walk. Health and fitness facilities offer group walking programs and access to places for walking, including places to walk indoors. Better access to parks, playgrounds, and recreational centers may encourage active transportation, such as walking to the location. Health and fitness facilities should be designed, built, and maintained to be accessible to the entire population, including people with mobility limitations or chronic conditions.

Schools

Schools can provide opportunities for physical activity through physical education, recess, after-school activity programs, and physical activity breaks, and walking can be incorporated into these opportunities. Schools can encourage walking by promoting safe routes for students to walk to and from school. Opening school facilities, such as gyms, playgrounds, fields, and tracks, to the community during non-school hours is a promising strategy to increase access to physical activity and recreational facilities[91] and increase physical activity levels.

Colleges and Universities

Walkable campus strategies help students, faculty, and staff members adopt active living behaviors on campus. Colleges and universities can also educate and train future professionals to recognize their role in promoting walking and walkable communities. This training can be directed to students in health disciplines, as well as to students in other relevant fields, such as architecture, transportation, urban design, and business.

Worksites

Worksites can offer access to on-site facilities or employer-subsidized, off-site exercise facilities to encourage physical activity among employees. They can adopt policies that include brief activity breaks, flexible schedules, and walking meetings as potential strategies to increase participation in worksite physical activity. Incentives and social support programs can also be used to encourage employees' interest and participation in physical activity programs.

Volunteer and Nonprofit Organizations

Volunteer and nonprofit groups can provide access to facilities, programs, and information to promote walking. For example, they can open their facilities and walking programs to the wider community for free or at low cost, or they can organize social support programs. These organizations can also serve as messengers to share information about the benefits of walking and walking programs and ways to improve walkability.

Health Care

Health care professionals can assess patients' physical activity levels and educate patients across their lifespan about the importance of physical activity. Counseling may be especially important for adults who are at higher risk of chronic disease, such as those who are overweight or obese and have additional risk factors for cardiovascular disease. Walking is an especially good activity for health care professionals to promote because most of their patients can walk, and walking can be easily modified to a person's abilities.

Media

The media can be effective in influencing attitudes and changing behaviors, including health behaviors. Media campaigns can be part of effective multi-component interventions designed to increase physical activity. However, evidence on the effectiveness of stand-alone mass media campaigns to increase physical activity at the population level is inconsistent.

Public Health

Public health professionals can conduct research and evaluate programs to determine what works to promote and sustain physical activity, including walking. They can summarize findings about what community approaches work to increase walking and walkability, and they can help other sectors design and implement interventions. They can convene partners across multiple sectors to learn from each other and to develop strategic action plans that efficiently use each partner's expertise and resources. Public health professionals also collect data about walking and walkability to measure and monitor changes over time.

Appendix B

10,000 Friends' Healthy & Walkable Community Implementation Team

The Research: Walkable Communities are Healthier & Sustain Equitable Economic Growth

The U.S. Surgeon General recently issued an urgent "Call to Action to Promote Walking and more Walkable Communities in the United States." This Call to Action was issued in response to years of mounting research evidence that community design that encourages sedentary lifestyles is contributing mightily to a growing epidemic of obesity and chronic diseases. The Surgeon General made the case, stating: 'One out of every two U.S. adults is living with a chronic disease, such as heart disease, cancer, or diabetes. These diseases contribute to disability, premature death, and health care costs. Increasing people's physical activity levels will significantly reduce their risk of chronic diseases and obesity. Increasing walking requires improving walkability – and that means that communities are redesigned, created, or enhanced to make it safe and easy to walk and that pedestrian activity is encouraged for all people of all ages and abilities. Actions by multiple sectors and professions working in a community, as well as by families and individual residents themselves, are needed to achieve these goals.'

Recent research by the George Washington University Center for Real Estate and Urban Analysis found a strong correlation between community walkability and the attraction and retention of an educated workforce in Pennsylvania's communities. These findings are consistent with what Bruce Katz identified as 'the changing spatial geography of innovation' – one in which walkable communities with multiple modes of transportation are favored by companies creating jobs in high-growth sectors. Positioning Pennsylvania's communities to attract jobs and talent, while providing opportunity for and remaining affordable to long-time residents, will require an intentional strategy that utilizes public-private partnerships to improve our communities.

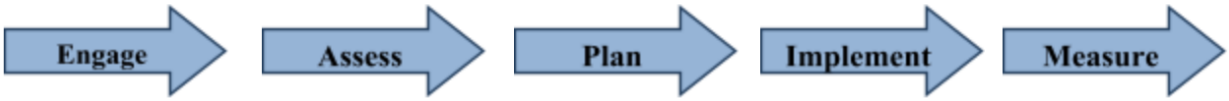
Walkable communities then, in addition to being economic engines, promote health and encourage healthy lifestyles. Our work focuses on implementation of plans and projects to help neighborhoods realize the benefits of quality, walkable community design – promoting both community health and economic opportunity for all.

The Challenge: Many Communities Have the Necessary Assets to Promote Walkability but Lack Capacity, Technical & Financial Resources

Many of Pennsylvania's older downtown areas and traditional neighborhoods have access to quality building stock, anchor institutions, and public transit service. The challenge that these areas often have is their lack of access to technical capacity and financial resources to leverage these assets in a coordinated and thoughtful manner.

Our Approach: Link a Multi-Disciplinary Team with Local Leadership to Plan & Execute Strategic Projects

The Community Implementation Team brings together a team of experts — both technical assistance providers and practitioners — to work with local leadership on strategic projects. The Team's work focuses on the entire process, from community engagement to measuring the results of completed projects. The Team's composition will depend on the particular needs of each community and the projects the community prioritizes, with relevant technical assistance provided throughout a period of sustained and intensive community engagement.



Our Services: Tailored to the Specific Needs of a Community

Community Engagement

- Convene, educate, and facilitate dialogue among community stakeholders on the impact of community design on residents' health and economic growth.
- Facilitate a community visioning process to develop a vision and strategy to make neighborhoods more walkable. Assist community in prioritizing projects.

Assessment

- Conduct a community assessment identifying key physical assets and needs.
- Utilize various tools to benchmark existing conditions including a Walkability Inventory and Asset Inventory Matrix.

Planning

- Develop a plan to strategically execute the priority projects identified; each plan will include at least one community transportation or strategic public infrastructure project.
- Conduct initial research, feasibility studies, and preliminary cost estimation.
- Evaluate potential sites for redevelopment and create project phasing strategy.
- Identify opportunities to access public-sector grants, loans and tax credits.

Implementation and Development

- Assist community in managing and executing the development process.
- Assist with site control and site preparation tasks.
- Prepare budgets, proformas and structure financing for projects.
- Assist with the solicitation, evaluation, and selection of private real estate developers, and the structure of resultant public-private partnerships.
- Assist with public program applications as appropriate.

Impact Measurement

- Complete post project data-driven assessment; evaluate data to determine program effectiveness and incorporate lessons learned.

Our Framework: Eligible Project Types

Affordable, Safe, & Mixed-Income Housing	Business District Commercial Re-Development -	Art, Cultural, and Historic Assets & Districts
Blight Removal Strategies	Multi-Modal Transportation & Walkability Improvements	Inclusionary Land Use & Complete Streets Programs
Community Greenspace - Parks, Playgrounds, & Trails	Better Access to Fresh & Healthy Foods	Neighborhood School Preservation or Re-Use
Green Infrastructure / Stormwater Management	Community Services & Partnerships	Public Safety and Municipal Policies & Codes

Appendix C

Elements of the Pennsylvania 'Innovation District' Ecosystem

(Adapted from "The Rise of Innovation Districts: A new geography of innovation in America," https://www.brookings.edu/essay/rise-of-innovation-districts/)

The following elements and assets are necessary to create a fully functioning Innovation District that is capable of realizing the synergistic benefits of the entrepreneurial economy in creating good-paying jobs, promoting "homegrown" job growth, and increasing GDP per capita and per capita incomes in Pennsylvania's core communities:

Economic Assets

- **Great Walkable Communities**—a walkable, mixed-use neighborhood in or adjacent to the Innovation District with housing choices, restaurants, coffee bars, community-serving retail, signified by those places receiving a Walk Score of 70 or greater from walkscore.com.
- **Innovation Drivers**—Universities, research labs and facilities, regionally-significant medical facilities, large employers, regional corporate headquarters, etc.
- **Entrepreneurs and Start Up Firms**—companies and professionals in a mix of new economy industries, including technology, medical sciences, research, industrial design, graphic arts, media, communications, architecture, finance, etc.
- **Cultivators**—public and private incubators, accelerators, tech transfer offices, high tech partnerships, 'greenhouses,' shared workspaces, job training centers, industrial development centers, Small Business Development Centers, Ben Franklin partnership facilities, and many community colleges.

Physical Assets

Include buildings, open spaces, greenspace, streets, and infrastructure.

- **Public Physical Assets**—parks, plazas, streetscapes, streets, multi-modal transportation options, traffic management, and other public investments.
- **Private Physical Assets**—privately owned buildings and spaces, especially new or renovated facilities suited to the entrepreneurial economy (spaces suited for more collaborative and creative work, including shared offices, shared workspace, live-work space, artist loft space, etc.).
- **Physical Assets that Knit the Innovation District Together**—includes both 1) the removal of physical barriers (fences, walls, one-way streets, etc.) and 2) the building of quality new connecting elements (transit improvements, bicycle lanes, trails, walking paths, sidewalks and streetscaping improvements, street furniture, additional and more active public space and greenspace—parks, pocket parks, etc.).

Networking Assets

Tools that facilitate more/better/easier access, contacts, and relationships among individuals and firms in the Innovation District have the potential to generate, refine, and accelerate ideas that can be transformed into products and services that can be brought to market.

- **Principally include computer and internet access essential in the modern digital world**—including high-speed broadband, wireless internet access (especially free wireless internet access), libraries, and public computer access.
- Encourage the creation of people networks, events, public places, and private establishments where individuals can "mix and mingle" and "crash into one another by chance," including dedicated programs for professionals both:
    - Within similar/related professions that historically work with each other;
    - To create new relationships and potential economic clusters among individuals from professions working in different contexts and where there is currently infrequent opportunity for contact, creating new relationships across the spectrum of the local economic sectors.
    - Such programs may include—networking events, 'happy hours,' workshops, training sessions, lecture or featured speaker series, etc.

Appendix D

Pennsylvania Cities' "Innovation District" Asset Inventory Matrix

Location	Walk Score	Park Score Ranking	University WalkUP Office Space (ft2)	University WalkUP Retail Space (ft2)	WalkUp University	Major Research University $ (NSF Research $)	Number of Accredited Medical Schools	Teaching Hospital/ Medical College-Related Health System	Number of Nationally/ Regionally Top Hospital (US News & WR)	Advanced Industries Share of all Jobs (Brookings)	Entrepreneurship Rank (Kaufmann Index)	2014 Venture Capital Investment (NVCA) ($mil)	Patents Granted 2000-2013 (USPTO, Patent Technology Monitoring Team)	Number of Local Business Assistance Center, Incubator or Accelerator	Local Complete Streets Policy/ Ordinance
Allentown - Bethlehem - Easton	86		3,299,000	113,000	1	33,227		2	6	7.7			4,359	7	
Erie	91		3,148,219	1,570,675	1	248		2	2				1,040	6	
Harrisburg-Carlisle	85		1,650,000	217,864	1	1,332	1	2	3	5.4		9.93	1,690	5	
Lancaster	92		3,131,488	130,223	1	3,772		1	1				1,538	4	Yes
Philadelphia	93	32	41,456,361	6,206,732	4	1,793,126	4	13	27	8.9	24	424.6	27,405	22	Yes
Pittsburgh	95	39	7,987,427	723,631	3	1,226,050	1	7	18	8.8	23	337.76	9,121	18	Yes
Reading									2				1,030	3	Yes
Scranton	91		2,668,632	1,778,028	1	251	1		1	5.2			818	7	
State College	95		12,786,273	813,379	1	825,561			0			2.61	822	4	Yes
Wilkes-Barre	90		1,767,921	756,883	1	248		1	1	5.2			818	7	
York-Hanover								1	2				1,229	5	
Total			77,895,321	12,310,415	14	3,883,815	7	29	63			775	49,870	88	
All Rural Areas, not MSA													375		

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