

**Tioga County Development Corporation**

# eNews Insider



Summer 2013

## Special Edition

### ***Tioga County's Economic Analysis & Forecast: 2013***

The *Tioga County Development Corporation* presents, as a public service, ***Tioga County's Economic Analysis & Forecast 2013***. This Special Edition is the eleventh in a series of Annual Reports on changes in the health and structure of Tioga County. The report is now part of the annual review of the ***Tioga County Enterprise Zone*** and will be included with the Measure of Attainment document.

The report is based on the performance of the County economy (by sector) in terms of jobs, wages and payrolls. The County is compared to other counties in the state and to the Commonwealth, to put Tioga County's performance in context. Although the source of the data remains the Unemployment Compensation ES202 files, the reporting agency for this year's data is the US Bureau of Labor Statistics.

This year's report is based on changes in the economy due to the Marcellus Shale natural gas drilling boom. It considers the decade from 2002 through 2012. The focus of this Economic Update is on the sectors which have seen the most impact from the gas drilling of the past several years. Particular concentration is on the growth of payrolls in sectors which are not directly related to the mining efforts.

### ***Regional Impacts of the Marcellus Shale Play***

Almost 11,000 natural gas wells have been drilled in Pennsylvania in the past five years, more than one-half (6,461) in the eight counties here defined as "north-central Pennsylvania": Tioga, Bradford, Susquehanna, Sullivan, Wyoming, Lycoming, Clinton, and Potter. (Figure 3) The center of the drilling activity has been in three Northern Tier Counties: Tioga (1,353 wells), Bradford (2,312), & Susquehanna (1,068). Washington County, in the southwest corner of the state, was the only other county to have over 1,000 well starts (spuds). ([www.Fracktrack.org](http://www.Fracktrack.org)).

The gas mining boom could not have come at a much better time for the north-central counties. Most of them had been losing employment since the early part of the decade. Between 2002 and 2009, Potter County lost 31.1% of its 2002 employment; Tioga lost 8.3% of its workforce; Sullivan lost 7.2%, Wyoming 6.3%. Bradford lost 5.3% and Lycoming 4.4%. Clinton's employment stayed about the same and only Susquehanna showed any gains, and that only 0.5%. (*Bureau of Labor Statistics, 2013*). These losses were not totally due to the recession of 2008; most of these counties had been losing employment at least since the beginning of the decade. Analysis of the sector data indicates that most of the long-term losses were from weaknesses in the manufacturing sector. The explosive growth of gas mining changed the economies of these counties in a positive and powerful way. In the three years from 2009 through 2012, all but one of the counties had growth in employment and five were in the top 15 statewide. (*Continued on next page*).

***Tioga County's  
employment  
grew by 13.3%  
from 2009 to  
2012.***

**Regional Impacts continued...**

Tioga's employment grew by 13.3% easily wiping out the losses suffered in the previous seven years. Susquehanna's employment grew by 12.1% and Sullivan's by 10.3%. Lycoming added 7.4% and Bradford 5.7%. While Wyoming (4.6%) and Clinton (4.2%) were not in the top 15 counties in percentage of employment growth, they also out-gained the state. Only Potter's employment continued to decline.

Some have argued that the growth in employment caused by the natural gas drilling is not very important because many of the jobs are in the lower paying service and retail sectors. However, the increase in total payroll would suggest differently. From 2009 through 2012, Tioga's payroll increased by 41.0 %, by far the greatest percentage gain in the state (Revised). In other words, not only were there more jobs but they were high paying jobs as well. (Washington County, also highly impacted by the shale drilling boom was second at 32.8%). Between 2009 and 2012 the total state payroll increased by 10.2%. All of the north-central counties, except Potter, had payroll increases of more than 11%.

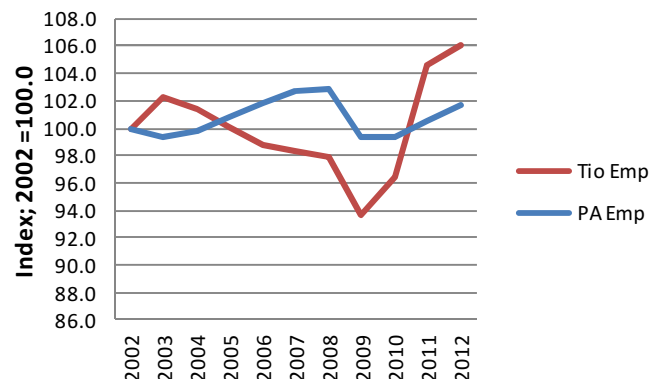
**From 2009 through 2012, Tioga's payroll increased by 41%**

**Employment, Wages, and Payroll Show Gains: 2002 – 2012**

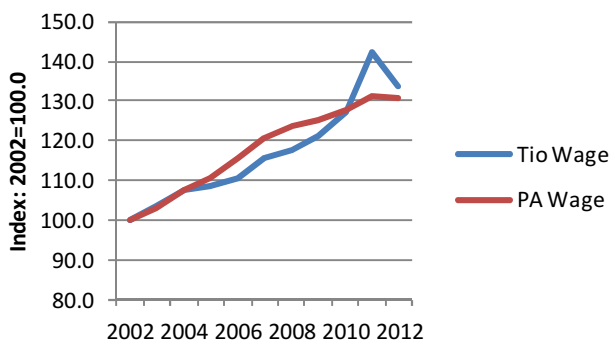
In 2012, there were 13,810 employees in Tioga County covered by Unemployment Compensation. (This total excludes self-employed workers and farmers and those covered by other unemployment programs such as railroad and postal workers). This was an increase of 6.0% over 2002 but the change in employment was very uneven over the decade. In fact, in 2009 total County employment was only 93.6% of the 2002 total. By 2011 the recovery from the recession plus the impacts of natural gas drilling brought the total employment back to 13,621, 4.5% higher than in 2002.

During the decade Pennsylvania employment fluctuated less than Tioga's, falling to 99.3% of the 2002 total in 2009 but gaining just 1.7% over the 2002 total by 2012.

**Figure 1: Index of Employment: 2002 -- 2012**



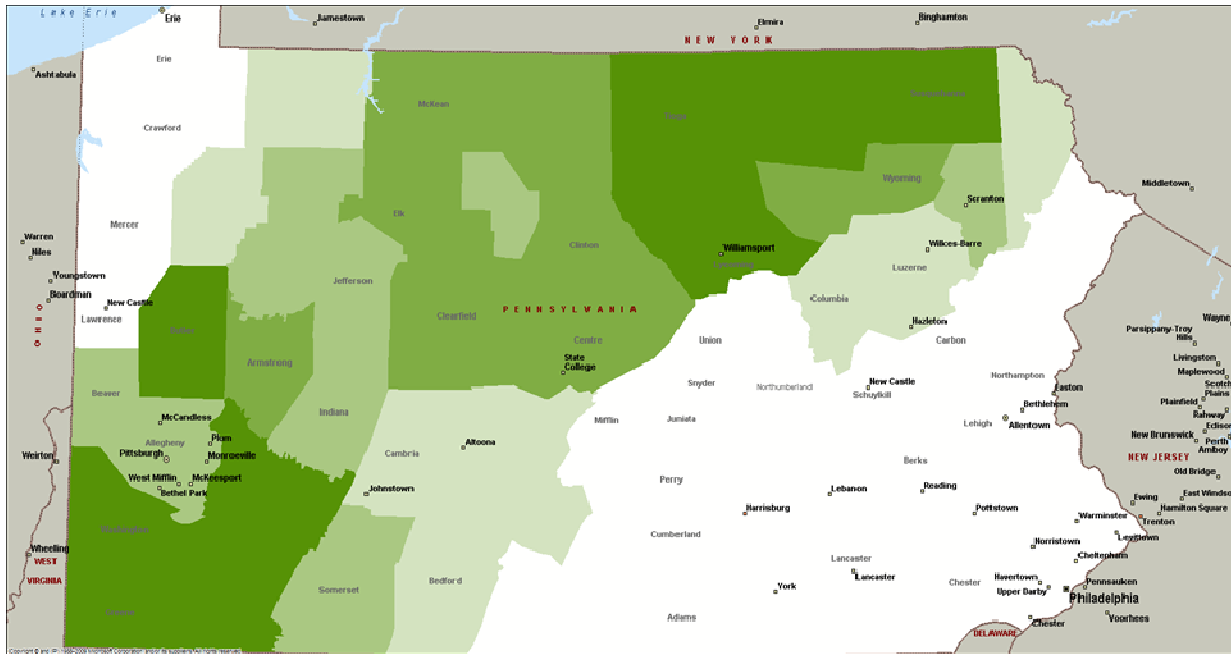
**Figure 2: Index of Total Wages: 2002 -- 2012**



Wages increased substantially in both the state and the County between 2002 and 2012. The average County wage grew from \$472 per week to \$658, an increase of 39.4%. In Pennsylvania the average grew from \$689 to \$899, or 30.5%. While County wages are growing relative to the state average, the County average is still just 73.2% of the state's average. The combination of strong wage growth and, in the past three years, strong employment growth caused a major increase in County payrolls.

Total County Payroll in 2002 was just over \$6.4 million weekly. By 2012 this had increased to almost \$9.1 million, a jump of over 41%. By contrast total payroll in the state showed slower growth, 32.7%.

Figure 3: Natural Gas Well Starts in Pennsylvania: 2009 —2012



Spuds

320 — 2,312



100 — 319



20 — 99



1 — 19



None



***Boom Times follow Natural Gas Investment***

The employment and payroll boom in Tioga County (and several other north central Pennsylvania counties) is directly the result of hundreds of millions of dollars invested in natural gas wells that are in the area known as Marcellus Shale field. The numbers for the Mining sector in Tioga County show truly exceptional growth. In 2002 the sector was too small to be reported separately and in 2009 only 20 workers were reported (This is actually a bogus number because, by then, there was substantial natural gas mining activity but most of the miners were from out of state and did not show up on the County payrolls). Even allowing for the fact that many well-drillers are still from out-of-state, the 2012 total employment in the sector was 363...an increase of 1,700%. Further Mining wages are among the highest in the County at \$1,089 per week. The direct payroll then of the sector in 2012 was \$420,354 per week. This, in itself, would be a nice stimulus to the County economy. But as shown below, the overall impact of the growth in mining activity has been much greater.

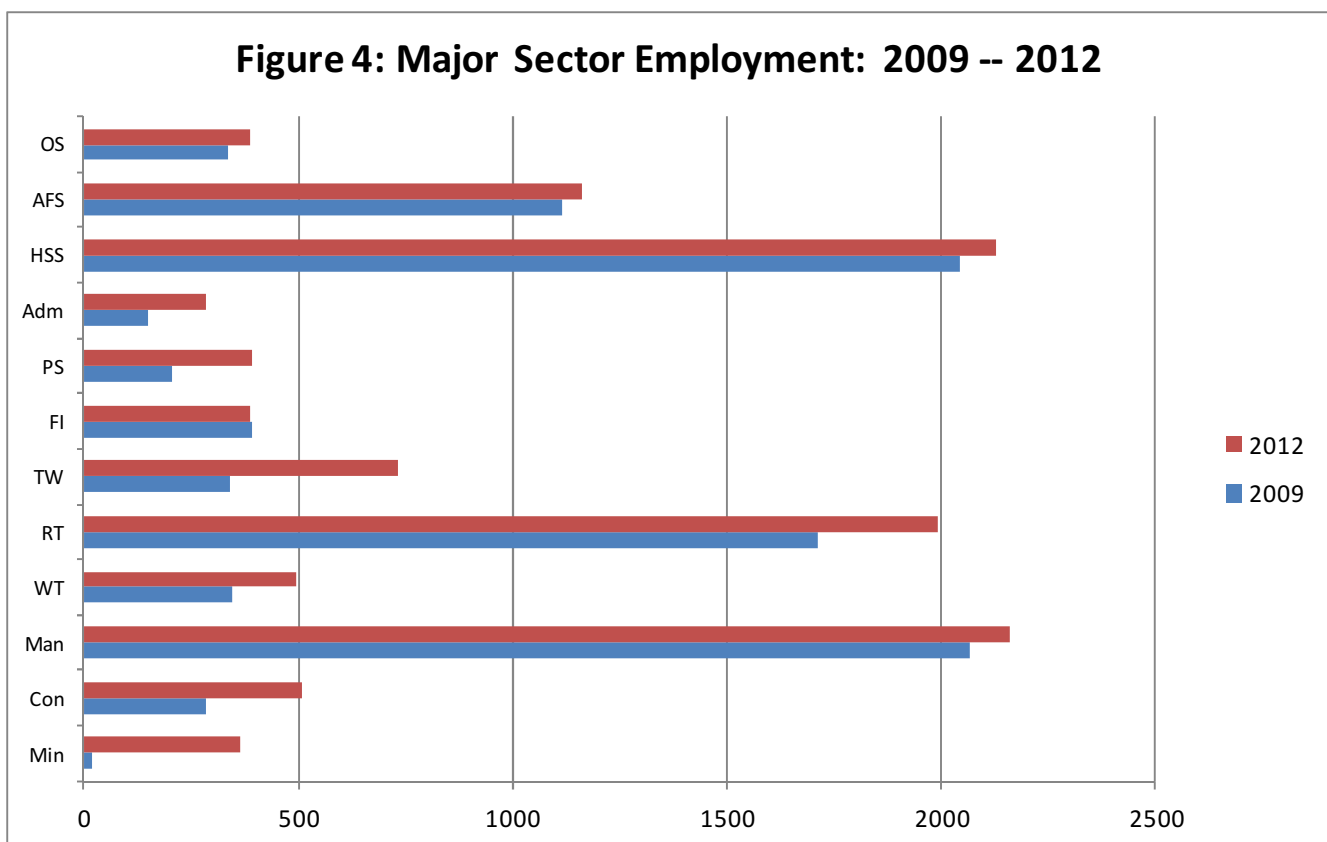
As mentioned Tioga is not the only county in the state to be heavily impacted by the Marcellus Shale boom. Statewide – even allowing for the fact there is little or no mining in most of the state’s counties – the sector’s employment grew by 98.8% from 2002 to 2012. Wages increased from \$863 in 2002 to \$1,398 in 2012. Overall, the sector payroll increased by 322%.

## ***Mining Impacts Spread across Tioga Economy***

As shown in the following sections growth in employment and wages (and, hence, payrolls) was quite uneven across sectors and over the years. Some sectors gained strongly and others languished; some years showed strong growth and others had declines in both employment and payroll. Although other factors were certainly in play, the primary engine for the rapid growth of employment and payrolls over the past few years was undoubtedly the drilling of over 1,000 gas wells in the County. On first glance it may appear that some of the sectors which had the strongest growth were not related to the mining boom. Closer analysis shows definite linkages.

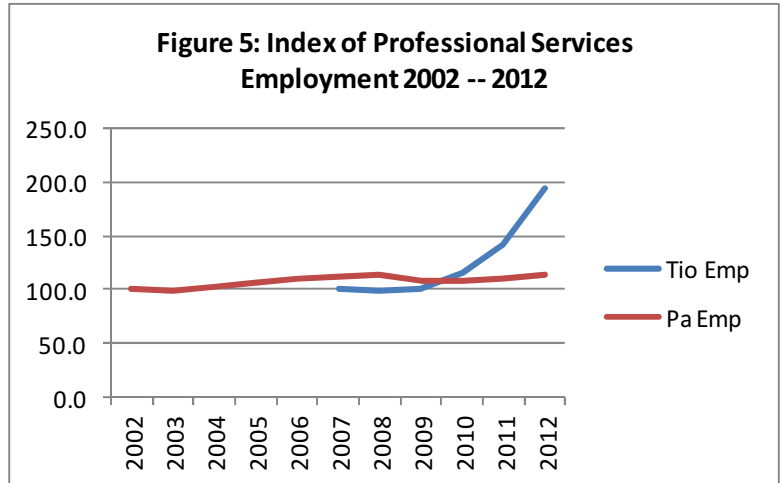
The sectors that have shown the greatest impact from the mining boom are those who provide goods or services indirectly to the natural gas industry. Typically these sectors provide inputs to the drilling process; these may range from specific physical inputs such as the concrete pads for the wells to legal and technical services and, thus, involve several different sectors of economic activity. Other sectors show strong impacts from secondary spending. This occurs when wages are paid to workers or local businesses receive payments for services or products. Some of those funds are re-spent in the local economy. For example, when a miner from Texas uses part of his wages to stay at a local motel or eat at a local restaurant that part of his wages is returned to the local economy and helps provide jobs in the Accommodations and Food Service sector. Expenditures at department stores, grocery stores, and the like have similar impacts on the Retail Trade sector. These second round expenditures are called induced impacts. Together these indirect and induced impacts multiply the effect of the direct investment on the local economy. This Update concentrates on the sectors most impacted by both indirect and induced spending.

**Figure 4: Major Sector Employment: 2009 -- 2012**



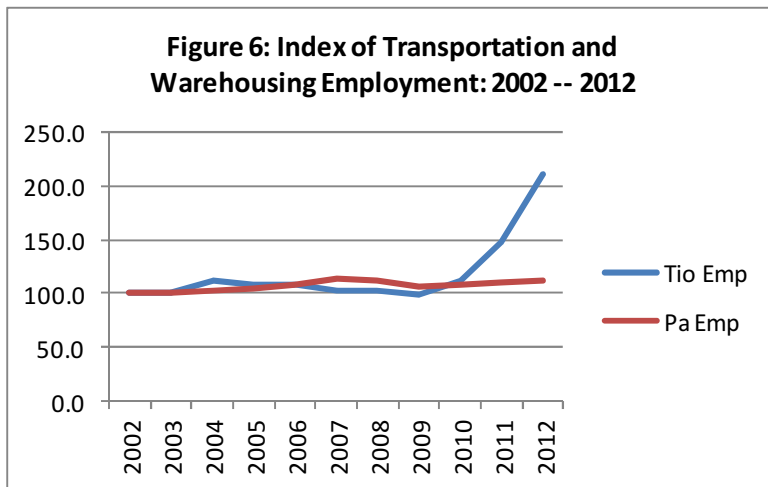
## Sectors Showing Largest Impacts from Indirect Spending

**Professional and Technical Services:** This sector has been greatly affected by the gas drilling boom. Professional Services in the County had 201 employees in 2002. Employment in the sector remained stagnant throughout the first half of the decade and in 2009 it had just 204 employees. However, engineers, accountants, lawyers, and the like have been in high demand in the past four years and in 2012 it had 391. This was an increase of 94.5%, almost all of it since 2009. The sector had only 1.5% of the total employment of Tioga County in 2002 by 2012 this had jumped to 2.8%. In comparison the state added 13.2% to its 2002 total over the period. Tioga is still quite underrepresented in this urban concentrated sector; 5.8% of all Pennsylvania workers are in the Professional Services sector.



Wage growth has reflected employment growth in County leading to a very rapid increase in payroll. In 2002, the average sector wage in Tioga was \$527 per week; this jumped to \$1,049 per week in 2012 – most of the change occurring in the past three years.

Statewide sector wages in Professional Services remain very much higher than County wages but the average wage grew from \$1,052 per week to \$1,463, or an increase of 39.1%. Total sector payroll in Pennsylvania grew by 57.5% while the County saw a near tripling (287%).



**Transportation and Warehousing** is an integral part of the natural gas mining process. Water trucks, equipment trucks, and the like are necessary for each well drilled. It is not surprising, therefore, that all of the growth in this sector in Tioga County has occurred in the past four years. Employment grew from 348 in 2002 to 733 in 2012, an increase of over 210%. However, in 2009 the sector had just 342 workers, actually down a few from 2002. The sector expanded from 2.7% of the County workforce in 2002 to 5.3% in 2012. Wages also increased greatly. In 2002 the average sector wage in Tioga was \$522 per week; by 2011 it was \$810. Perhaps because of the

slowing of demand in 2012, the average decreased slightly to \$782 per week. Even after this adjustment is taken wages grew by 50%. Hence, total weekly payroll increased from \$181,656 to \$573,206. This represents an overall growth in payroll of 215%.

The Transportation and Warehousing sector in the state added a modest 11% in employment with wage growth of 17.4%. Payroll grew by 30.3%. The sector makes up 3.8% of state employment. This is the only Tioga County sector where the County weekly wage exceeds the state wage.

## Largest Impacts, cont'd

**Figure 7: Index of Wholesale Trade Employment: 2002 -- 2012**



**Wholesale Trade** is another sector strongly impacted by the natural gas drilling. Employment has more than doubled in the past ten years and, as in the case of Transportation and Warehousing and Professional Services, most of that growth occurred after the Marcellus boom began. In 2002 the sector had 237 employees. In 2012 it had 493. (Actually in 2011 it had 531). Wholesale was sector on the rise throughout the decade. It had grown by nearly 60% between 2002 and 2008. Still, the recession took its toll in 2009 and the kick-start provided by demand from the gas industry was a major factor in its recent growth.

Wages also saw a major uptick over the decade. In 2002 the average weekly wage was \$579 and in 2012 it was \$894. This was an increase of 54.4%, well over the County average. Overall, sector payroll grew by 221%.

Evidence that it was local factors such as the gas mining that drove the growth of Wholesale Trade in Tioga is provided by comparison with the Pennsylvania experience. The state added just 1.6% to its Wholesale employment. Statewide, however, wages grew by almost 47% over the period. The sector is still somewhat underrepresented in the County: only 3.6% of Tioga employees are in Wholesale compared to 4.6% statewide.

**Construction:** Natural gas drilling requires substantial Construction sector inputs. This is evident in the recent history of the sector in Tioga County. In 2002 the sector had 273 workers in the County and in 2009 just 287. However, in 2012 the Construction sector employed 509. This was a growth of 86.4% over the decade. Wages in 2002 were \$410 per week and in 2012 \$721, an increase of 75.8%. Total sector payroll grew by more than 227%.

By comparison, the sector lost 10% of its 202 employment in Pennsylvania and weekly wages grew by 35.4%. Total sector payroll in Pennsylvania grew by 21.8%. Even after the recent growth the sector comprises 3.7% of Tioga's workforce and 4.3% of employed persons in the state.

**Figure 8: Index of Construction Employment; 2002 -- 2012**

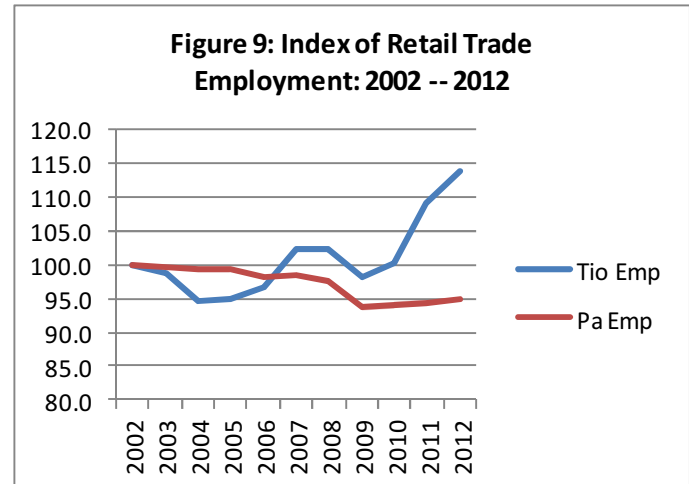


**Administrative Services and Waste Management:** Before natural gas mining really took off in Tioga County the Administrative Services sector was in dire straits. It had fallen in employment from 238 in 2002 to 150 in 2008. It finished the decade with 287 workers, a 20.6% increase over 2002. All of the gain occurred between 2010 and 2012. Wages grew from \$430 per week to \$709, an increase of 64.9%. Again most of the increase came in the past two years. Therefore, the sector payroll, which was \$102,340 per week in 2002 jumped to \$203,483 in 2012, nearly a 100% change. An indication of how important the mining boom was to the sector in the County is found in the Pennsylvania statistics. Over the decade Administrative Services added 7.2% to its employment base and wages grew by just 28.5%. Total change in payroll was 34.6%.

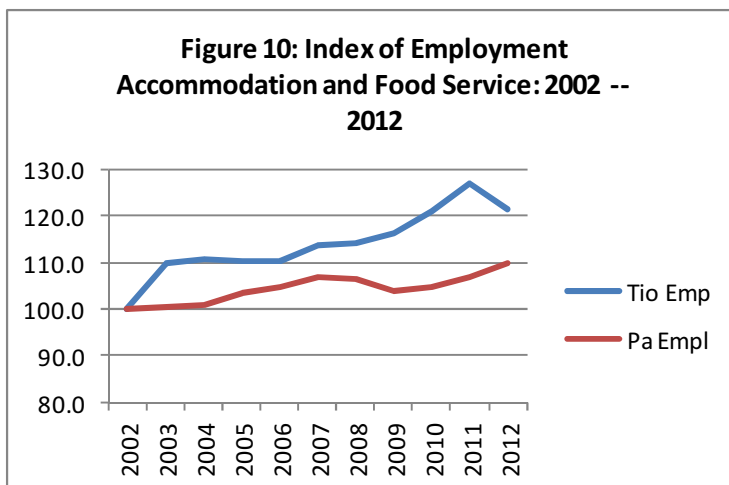
## Induced Impacts

**Retail Trade** remains the third largest private sector in the County. In 2012 it had 1,990 employees, up from 1,749 in 2002, an increase of 13.8%. Wages are still low compared to most other sectors but the boom in overall local employment has impacted this sector substantially. The average wage jumped from \$302 per week to \$415 per week over the decade, with much of that increase coming in the past four years. The 34.7% change in wages, coupled with job growth, led to an increase in weekly payroll from \$528,198 in 2002 to \$825,850 by the end of the decade, a growth of 56.4%.

Tioga's retail sector performed much better than the state average over the period. Between 2002 and 2012, the state lost 5.1% of its jobs in the sector. Furthermore, sector wages in Pennsylvania grew by just 19.1% and, therefore, payroll increased just 13.0%. The relatively rapid growth in County wages in Retail Trade caused the Tioga wage in the sector to grow from less than 74% of the state average to 85.2%.



**Accommodations and Food Services** is the only sector in Tioga County other than Government, Health, Manufacturing, and Retail with more than 1,000 workers. In 2002 it had 959 which grew to 1,164 in 2012. It now comprises 8.4% of the total workforce.



The 28% growth in the sector over the period was not completely due to the boom in natural gas mining as one might suspect; indeed the sector grew by 14% before the Marcellus drilling began. Still that has obviously been an important factor. Employment might have grown even more if the physical lodging and restaurant facilities existed in the County. The growth in AFS statewide has not been as robust. Between 2002 and 2012 the sector's employment grew by 9.7%.

The average sector wage in the County increased from \$165 per week to \$249 over the decade, almost 51%. While this is the lowest average wage paid by any sector, it should be remembered that tips and gratuities make up a large portion of each worker's actual take home pay. In Pennsylvania, as a whole sector, wages are also comparatively low. The state average wage in the sector in 2012 was \$300 per week, up from \$239 in 2002. Therefore, sector wages in the state rose by just 25.5%. The differential in wage and employment changes reflects strongly in the change in payrolls. The Tioga County payroll in 2002 was just \$158,235 weekly; in 2012 it was \$289,836, a growth of 83%. By comparison the Pennsylvania payroll in the sector grew by 37.7%.

## *Induced Impacts, Cont'd*

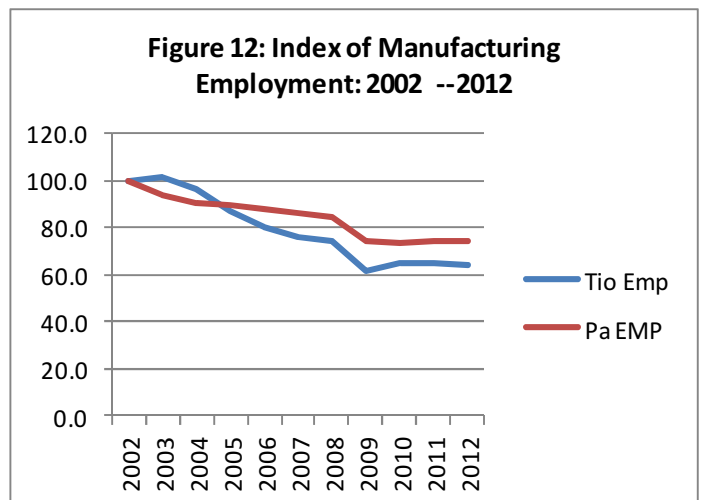
**Other Services** sector includes several personal services such as barber and beauty shops, and funeral homes, as well as miscellaneous services which serve both business and personal needs. As such, both indirect and induced impacts are felt. Although employment growth has been fairly modest (20.4%) almost all of that growth has occurred in the past three years and is, an impact of the natural gas mining. In 2002 the sector had 323 employees and in 2009 just 336. By 2012 there were 389 workers. Wages increased from \$261 to \$427 per week, again with most of the gain coming very recently.

In Pennsylvania the sector has been almost stagnant. Employment grew by just 0.9% and wages grew by 31.1%. Statewide the sector is 3.5% of the workforce and, in the County, 2.8%.

## *Other Sectors*

Despite the widespread impacts of the Marcellus Shale play, several sectors showed little or no apparent benefit. (It is, however, likely that growth in these sectors would have been even slower -- or declines worse -- without the added employment in County). These sectors include several of the largest in the County: Health and Social Services, Manufacturing, and Government. The minimal impact argument is based on comparison of the sector in the County compared with the same sector in the state.

**Manufacturing:** Declines in manufacturing employment continue to plague both Tioga County and the Commonwealth. As recently as 2003, manufacturing employment made up over 25% of Tioga's total employment. By 2012 the sector was only 15.6% of the workforce. Over 1,200 jobs have been lost in the sector during the decade, from 3,379 in 2002 down to 2,161 in 2012. This was 36% of the 2002 total. There has been a slight rebound in the past three years. The low point in manufacturing employment in the County was 2,065 during the recession of 2008—2009. Statewide the loss of manufacturing employment has been severe since the mid-1970s. By 2002, manufacturing employment was only 14.3% of the total workforce. By 2012, manufacturing jobs were just 10.5%. However, as in Tioga, the major job loss occurred before 2009 and sector employment has been fairly constant over the past three years.



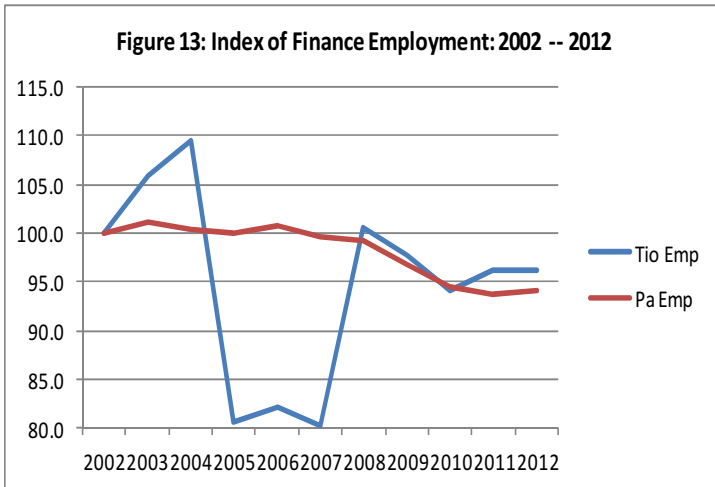
Weekly manufacturing wages grew more than 38% between 2002 and 2012 in Tioga County, a substantially larger percentage than the 30.8% recorded by the state. However, the wage increase did not totally compensate for the loss of jobs as payroll in the sector declined by 11.6%. Statewide, Pennsylvania's manufacturing payroll fell by 2.8% over the decade.

Despite the increase in Tioga Manufacturing wages, the average manufacturing wage in the County remains low compared to the Commonwealth. The 2012 wage in Tioga was \$791 per week compared to \$1,046 in the state, just 75.6%.

**Health and Social Services** is now the largest private sector in the Tioga workforce. It grew from 1,662 employees in 2002 to 2,127 in 2012. This was an increase of 28%. Wages grew from \$502 per week to \$621, an increase of 23.7%. Hence total sector payroll increased from \$834,324 to \$1,320,867 weekly or \$486,543; a growth of 58.3%. Although Pennsylvania's Health and Social Services sector also showed sustained growth over the period, it lagged the County in the rate of change in employment. The state added 21.8% to its employment base over the decade. Wages in the state however grew by 32.3% and payroll by 61.2%.



## Other Sectors, Cont'd



**Government** sector in the state fell by 3.1% statewide and 7.8% in the County. Governments at the federal, local, and state level employ the most people of any sector in the Tioga economy. In 2012 the sector employed 2,508 persons in the County, over 18% of all workers. Government employment is seldom directly related to other activities in the local economy. Political policies and decision-making have a much greater influence. However, macro-economic concerns, such as available tax revenues, recession and the like do have an impact. Such has been the case in both Tioga County and the Commonwealth of Pennsylvania in the past decade. For the first seven years employment remained almost constant, gaining just 0.4% in each. The Great Recession of 2008 --2009 reduced the tax income of the state severely and this showed up in 2011 and 2012. Employment in the Wage growth in the Government sector did not keep pace with the state or county overall rate of growth. In Tioga wages grew by just 20.3% and in the state by 27.3%.

**Finance and Insurance:** Employment in the Finance and Insurance sector has not fared well in the state or the County over the past decade. This is largely due to the changes which are occurring in the internal structure of the major industries, notably banking. The small sector lost 15 employees from its total of 401 in 2002 and was down to 386 in 2012. While this was only 3.2% of its total, it was still significant since other white collar industries were gaining over the period. Wage growth also did not keep pace with the overall economy. Average weekly wages rose from \$616 to \$811 per week. This was a gain of 31.6% compared to the average of 39.4%. Sector payroll was up 26.7%.

In Pennsylvania the sector picture was mixed. Finance and Insurance lost 5.9% of its employment but wages increased by 44%. Hence, payroll was up by 35.5%.

## Sectors not Evaluated

The performance of several sectors is not discussed here. These sectors have fewer than 200 employees in the County and, in some cases, are not shown separately in the data. These include Agriculture, Utilities, Information, Real Estate and Leasing, Management, Educational Services, and Arts, Entertainment, and Recreation. Agriculture actually has many more than 200 persons employed in the sector but they are typically family farmers and are, therefore, not included in the database. Likewise, public education employees are covered under government rather than the Education Services sector.

## Summary & Forecast

With hundreds of millions of dollars spent directly on the gas wells, the indirect and induced impacts on the local economy were felt throughout many sectors. Indirect impacts are caused by the purchase of local goods and services required for the initial capital investment (drilling in this case) to occur. These include construction activities, transportation, and wholesale goods, as well as engineering and other technical services. Induced effects include those caused by the increase in payrolls attributable to the direct investment. The sectors clearly affected by this re-spending of wages and salaries in Tioga County were Retail Trade, Other Services, and Accommodations and Food Services. In the longer term, when more than three years worth of data is available, the spread of these impacts may – will – affect other sectors as well. For example, if drilling occurs for many more years, as predicted, locally manufactured goods, such as pipes, may replace those made elsewhere and transported into the County.

**Tioga County Development Corporation**

Tioga County, Pennsylvania

**UNEMPLOYMENT RATES: 2011 FINAL**  
**Tioga County Labor Market Area**

Month	Year	Tioga County	Civilian			United States	Difference
			Labor Force	Pennsylvania	Difference		
January	2011	6.6	20,800	8	-1.4	8.9	-2.3
February	2011	6.3	20,800	8	-1.7	8.8	-2.5
March	2011	6.2	21,000	7.9	-1.7	9	-2.8
April	2011	6.2	20,700	7.9	-1.7	9.1	-2.9
May	2011	6.6	20,500	8	-1.4	9.2	-2.6
June	2011	7	20,600	8	-1	9.1	-2.1
July	2011	7.5	20,700	8.1	-0.6	9.1	-1.6
August	2011	8.1	20,700	8.1	0	9.1	-1
September	2011	7.5	21,100	8	-0.5	9	-1.5
October	2011	7.2	21,000	7.9	-0.7	9	-1.8
November	2011	5.8	22,400	7.8	-2	8.3	-2.5
December	2011	5.9	21,000	7.7	-1.8	8.3	-2.4

<b>ANNUAL AVERAGE</b>		<b>6.74</b>	<b>20942</b>	<b>7.95</b>	<b>-1.21</b>	<b>8.91</b>	<b>-2.17</b>
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**Tioga County Development Corporation**

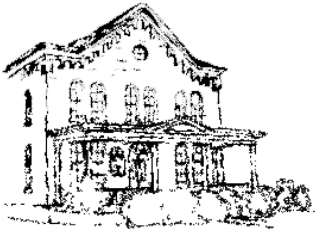
Tioga County, Pennsylvania

## UNEMPLOYMENT RATES: 2012 FINAL

### Tioga County Labor Market Area

Month	Year	Tioga County	Civilian		United States	Difference	
			Labor Force	Pennsylvania			
January	2012	6.1	22,700	7.5	-1.4	8.2	-2.1
February	2012	5.3	22,600	7.6	-2.3	8.3	-3
March	2012	6.5	22,700	7.5	-1	8.2	-1.7
April	2012	5.9	22,900	7.4	-1.5	8.2	-2.3
May	2012	6.2	23,100	7.4	-1.2	8.2	-2
June	2012	7.2	23,600	7.5	-0.3	8.2	-1
July	2012	7.5	23,800	7.9	-0.4	8.3	-0.8
August	2012	7.9	23,500	8.1	-0.2	8.1	-0.2
September	2012	7.9	24,300	8.2	-0.3	7.8	0.1
October	2012	7.8	24,100	8.1	-0.3	7.9	-0.1
November	2012	7.6	24,000	7.8	-0.2	7.7	-0.1
December	2012	8.1	24,200	7.9	0.2	7.8	0.3
<b>ANNUAL AVERAGE</b>		<b>7.00</b>	<b>23458</b>	<b>7.74</b>	<b>-0.74</b>	<b>8.08</b>	<b>-1.08</b>

Source: Pennsylvania Department of Labor &amp; Industry, Center for Workforce Information &amp; Analysis



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For the 11th year, the *Tioga County Development Corporation* is pleased to present our Annual Economic Analysis Summary of the Economy of Tioga County, Pennsylvania... ***Tioga County's Annual Economic Analysis & Forecast: 2012.*** *An Annual Economic Analysis Summary for Tioga County, Pennsylvania.*

Prepared under contract with *VanLandingham Consulting*, this Analysis presents an independent analysis of the economic conditions in Tioga County compared to the Region, the Commonwealth and the Nation. Wade VanLandingham has over thirty nine years of economic development planning and analysis experience. He performs similar reports for several other counties in the State. He has been under contract with *TCDC* since 1998 and possesses an extensive knowledge of our economy.

This is the fifth year Wade has provided projected impact information on the Marcellus Shale development growing everyday in Tioga County. We have seen a major impact in trucking, housing and fuel consumption and with yet more to come. While our economy for the past year reflected the national and state recession, there is considerable evidence of the growing economic impact of the Marcellus Shale Play in Tioga County. Tioga County was the 2nd fastest growing county in job creation in 2009. Due to the lag in data, this is not reflected in this year's report. Even with the downturn in activity, major investments in the gas & oil industry continue to positively impact direct services to the industry, such as trucking and rail and indirect services are being positively impacted as well including lodging and restaurants, but on a smaller scale.

As with any development, there are both positive and negative impacts. The environmental concerns are being addressed by DEP and SRBC. Local concerns include the transportation system, housing and municipal services. Pennsylvania will be implementing a tax this fall for the Marcellus Shale Industry. We are beginning to see the impact of the Marcellus Shale Impact Fee and the proceeds from the fee go directly to the impacted area. This industry will be in our county for generations to come. We all need to address the impact for the benefit of the area to ensure these generations will profit in a positive and productive manner

The *Tioga County Development Corporation* hopes this Analysis will assist you in developing strategies for your future growth. It is our pleasure to provide you with this economic development forecasting tool. *TCDC* is here to assist you in your growth and development in making ***Tioga County . . . a place to call home.***

Robert J. Blair  
President/Chief Executive Officer

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