



**ECONOMIC &
WORKFORCE
DEVELOPMENT
WORK GROUP**

**MARCELLUS SHALE
ADVISORY
COMMISSION**

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NTRPDC
NT WIB**



NT Quick Facts

There are 166 municipalities in the 5 counties that we serve, with a total population of 181,008. Municipal populations range from a high of 5,813 (Sayre Borough) to 51 (Elk Township).

Our population density is 46 people/sq. mile, compared to the state's 274 people/sq. mile.

The region has approximately 4,700 businesses.

Establishments range in size from the single entrepreneur to the 2,300 employees at Procter and Gamble.



Traditional Industry Clusters

Building and construction

Health care and social assistance

Diversified manufacturing

Lumber and wood products

Past Market Conditions

Historically, the region is:

- Slow to change, lagging behind state and national trends
- Steady economy
- Focus on agriculture and manufacturing

Population

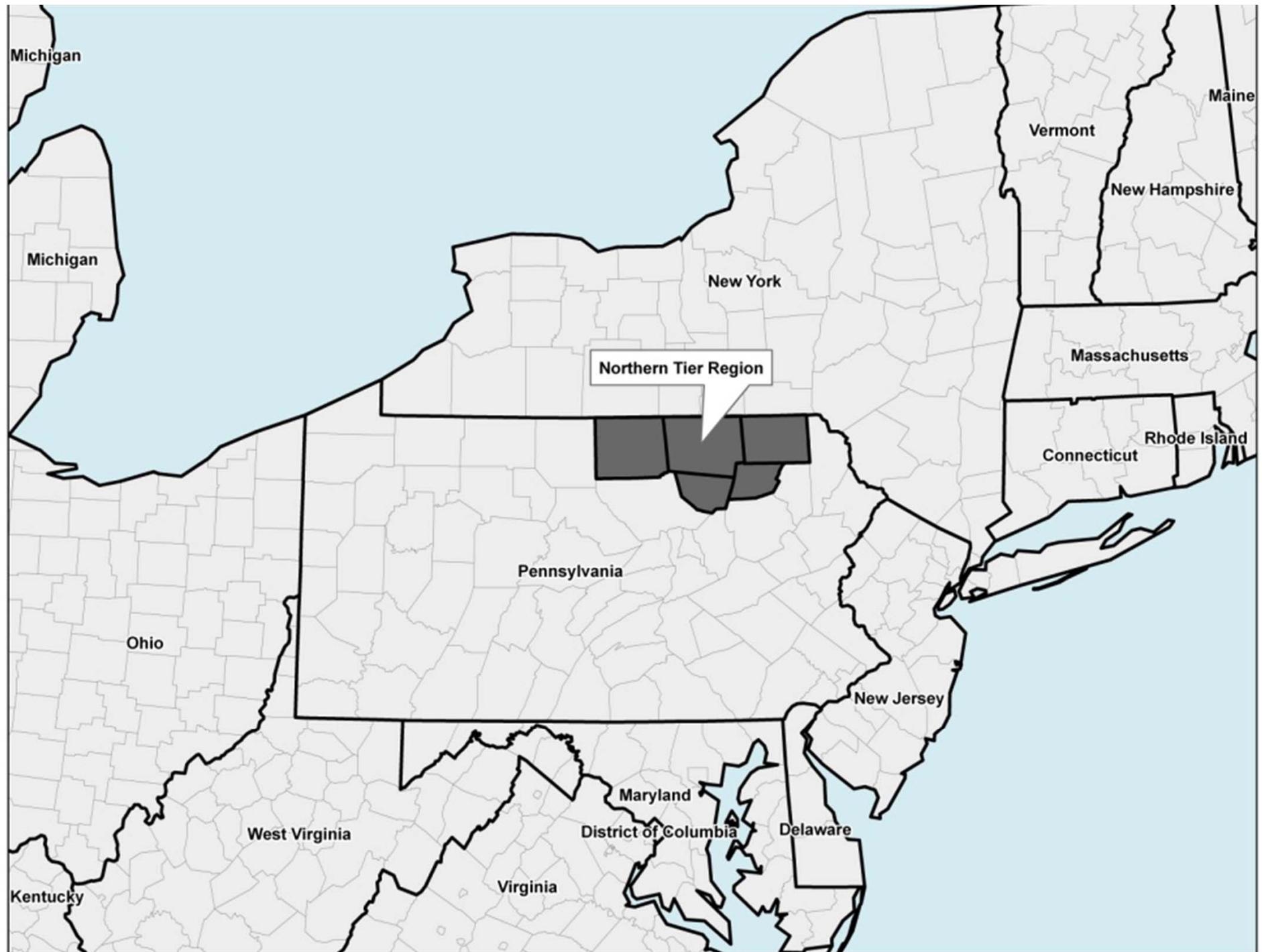
Census Annual Population Data in Multiple Counties(s) for 2006

Bradford County	62,471
Sullivan County	6,277
Susquehanna County	41,889
Tioga County	41,137
Wyoming County	28,093
Northern Tier Region	179,867

Census Annual Population Data in Multiple Counties(s) for 1986

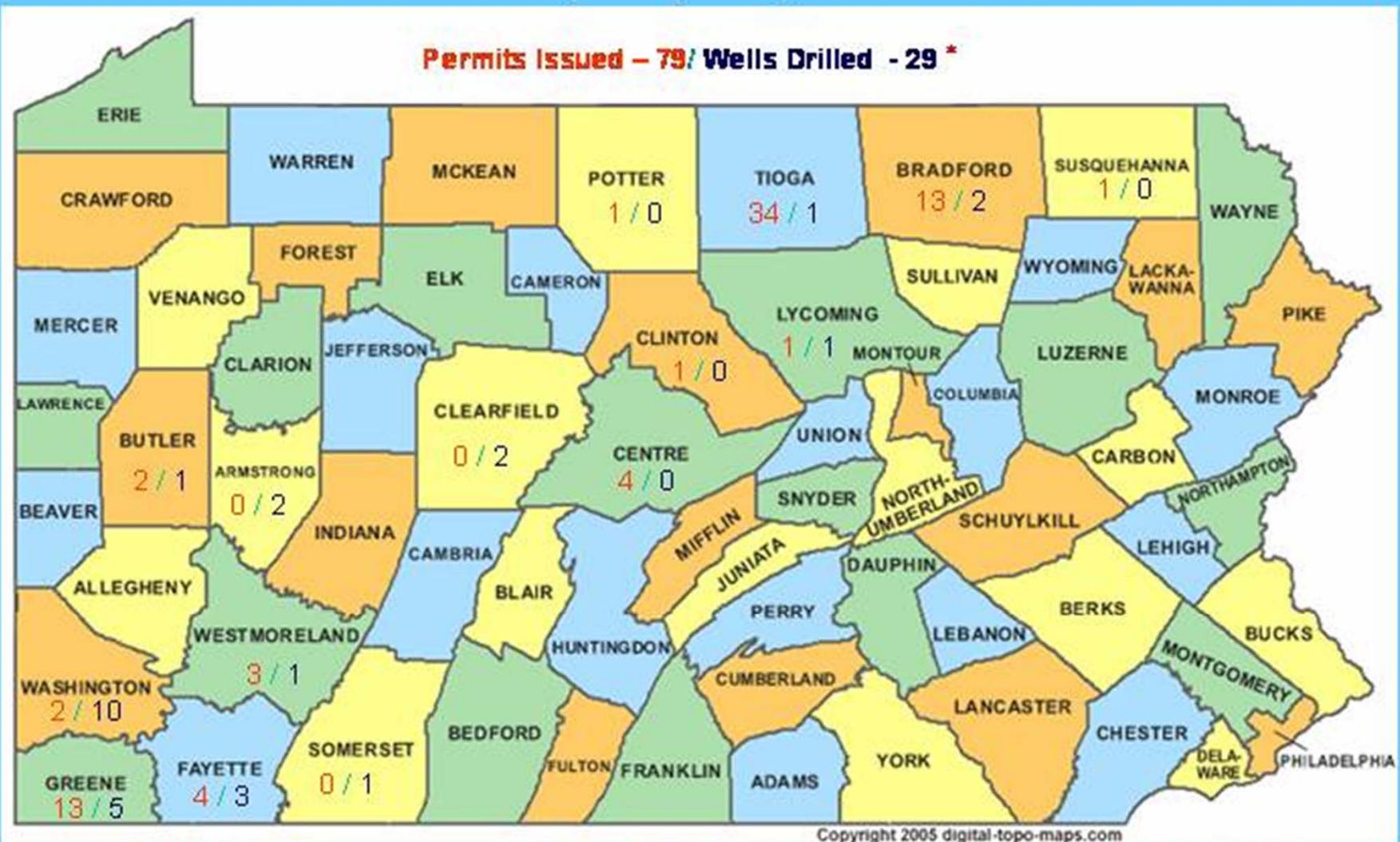
Area Name	Year	Population
Northern Tier Region	1986	174,799
	1996	181,091
	2006	179,867

Source: PA Dept of Labor and Industry



**Department of Environmental Protection
Bureau of Oil and Gas Management
Marcellus Shale Permits Issued & Wells Drilled
(January - 2009)**

Permits Issued - 79 / Wells Drilled - 29 *

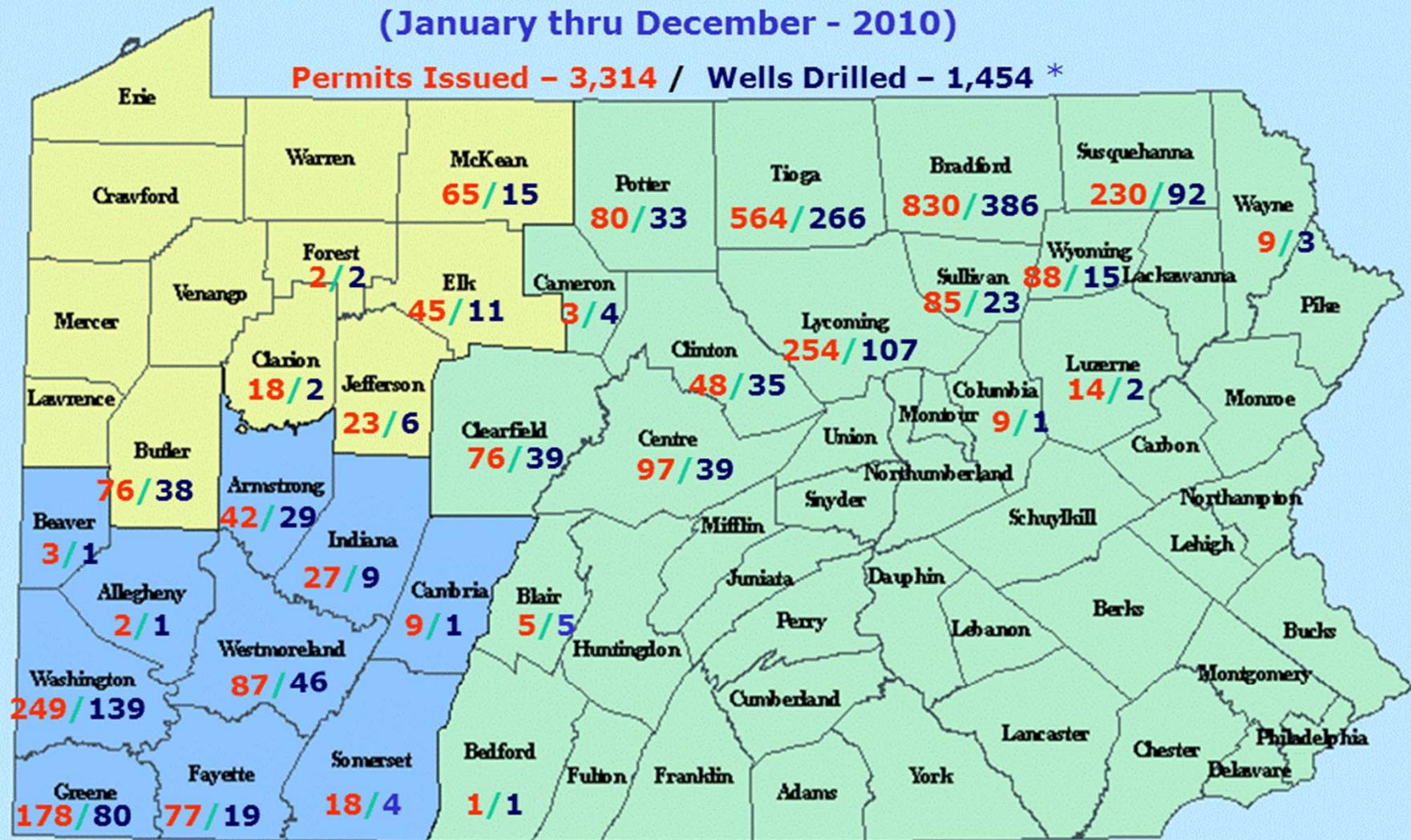


Updated 02/27/2009

* As reported by Operators

**Department of Environmental Protection
Bureau of Oil and Gas Management
Marcellus Shale Permits Issued & Wells Drilled
(January thru December - 2010)**

Permits Issued – 3,314 / Wells Drilled – 1,454 *

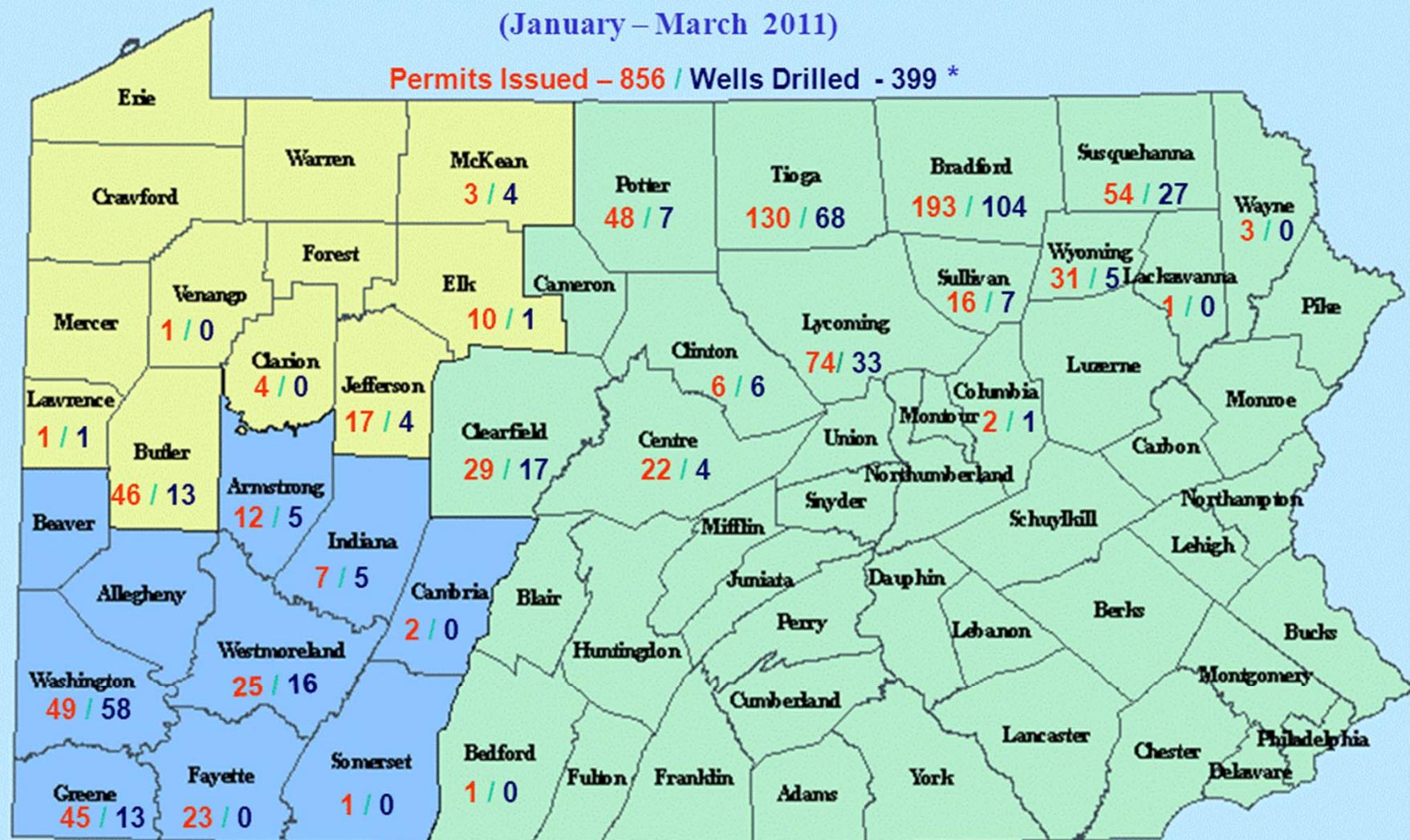


Updated 01/25/2011

*** As reported by Operators**

Department of Environmental Protection
Bureau of Oil and Gas Management
Marcellus Shale Permits Issued & Wells Drilled
(January – March 2011)

Permits Issued – 856 / Wells Drilled - 399 *



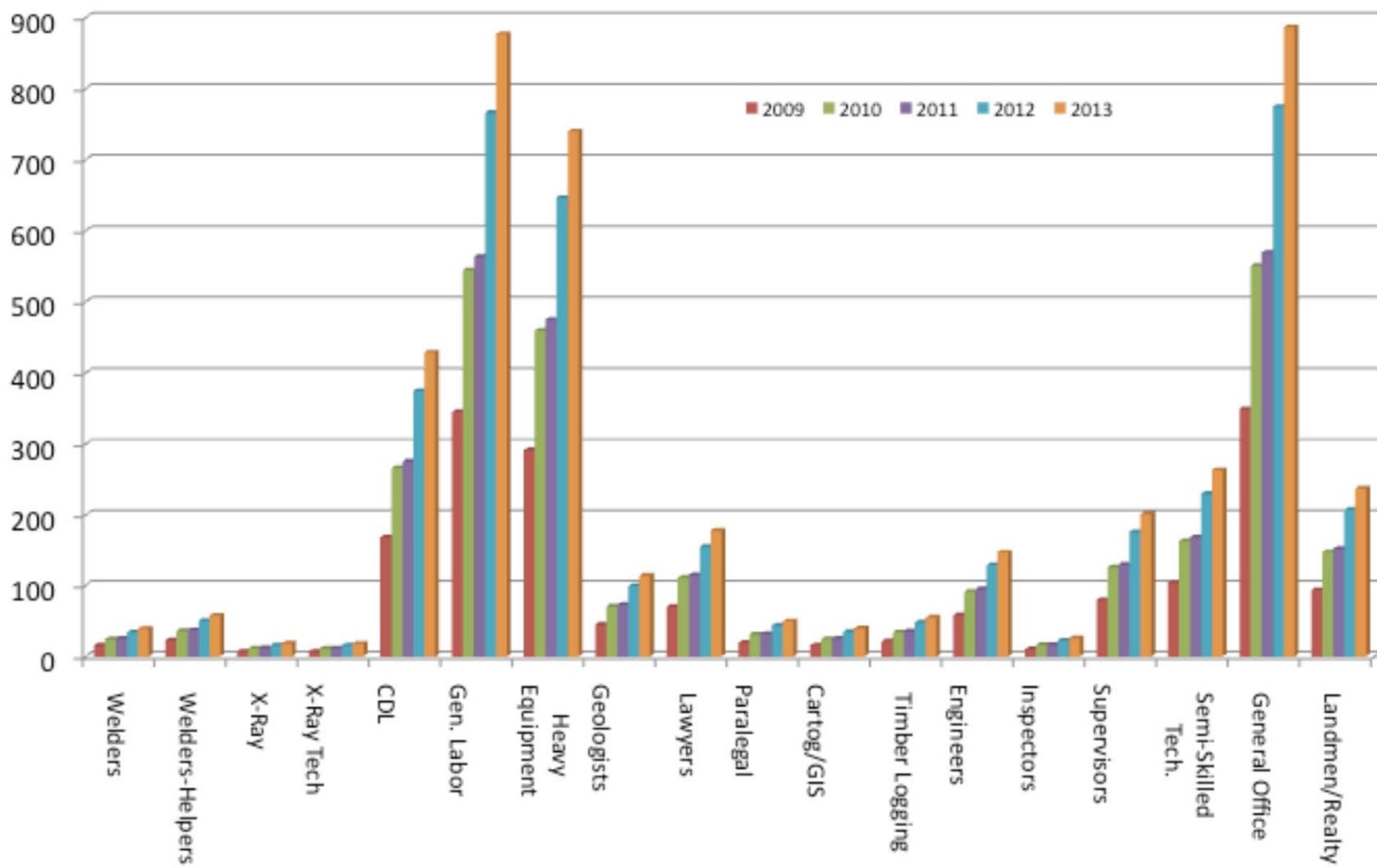
Updated 04/06/2011

* As reported by Operators

Northern Tier WIB Region						
Year	2008 ²	2009	2010	2011	2012	2013
Low Scenario	54	105	166	172	233	267
"Likely" Scenario	54	140	221	229	311	356
High Scenario	54	175	277	286	389	445

Figure 4: Projected Marcellus Shale Wells, Drilled Per Year 2009-2013

Estimated Northern Tier WIB Region Occupational Requirements 2009-2013



- Penn College Workforce Needs Assessment

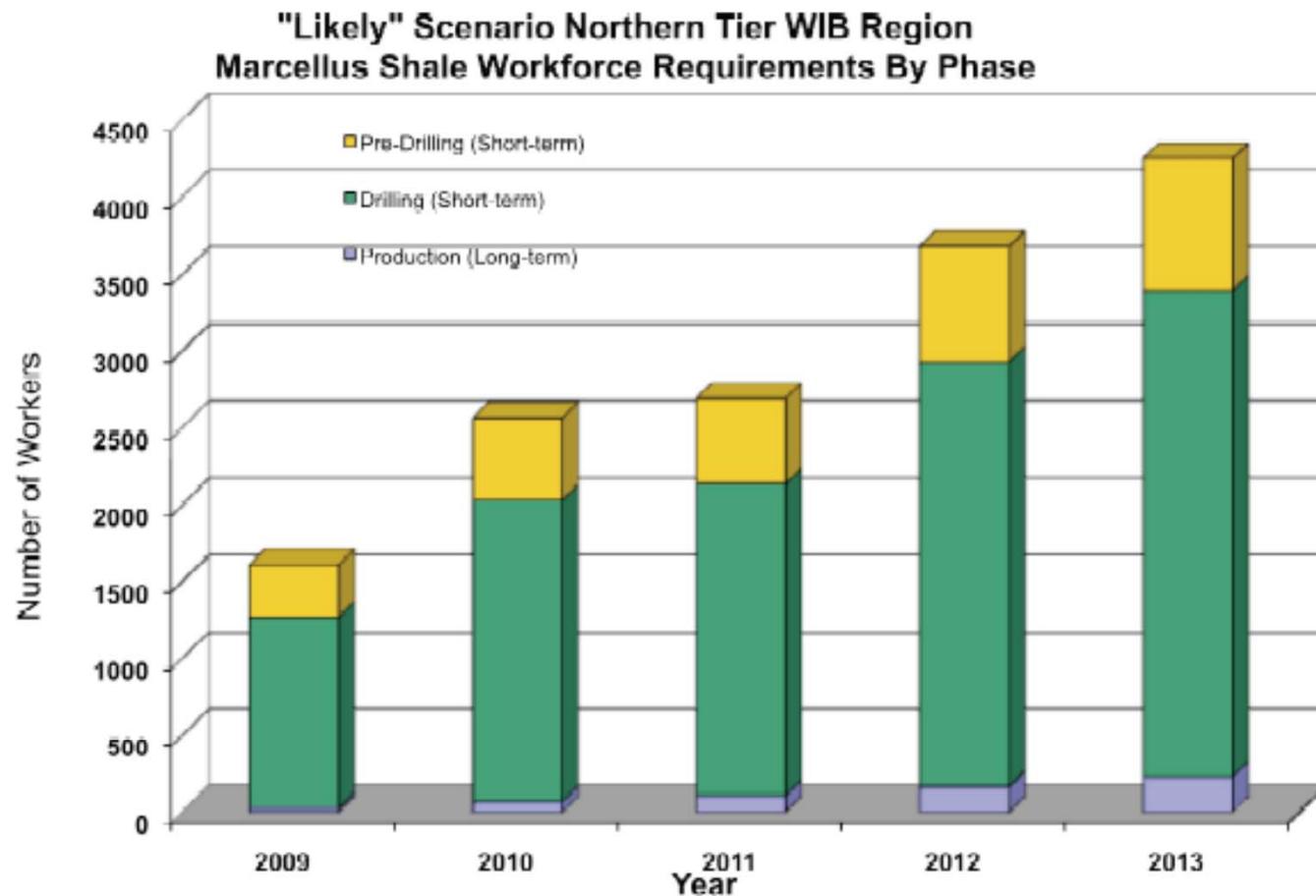
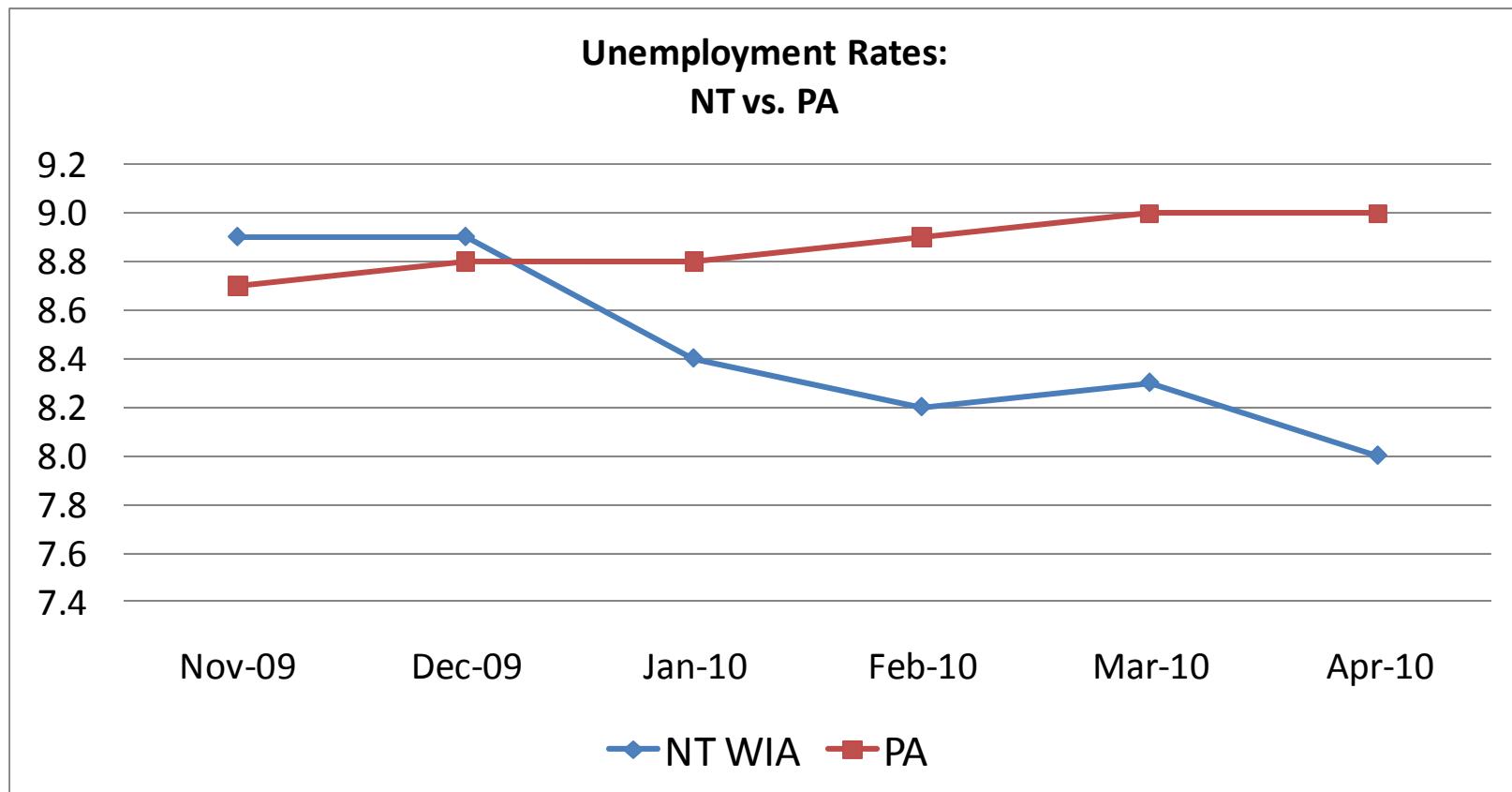


Figure 13: Workforce Requirements by Industry Phase, Northern Tier WIB Region

Unemployment Impact





Projected Job Growth? Old Prediction

100 wells drilled per year = 1153 jobs per year over 10 years



Employment between April 2009 and 2010 increased by 2,500 for Bradford County and 900 for Tioga County

4,100 employment openings region wide

Largest growth in the Commonwealth

January 2008

Monthly Seasonally Adjusted Labor Force, Employment and Unemployment data in Multiple Counties(s) for January, 2008. To see the most recent profile data click on the area name.

Area Name	Civilian Labor Force	Employment	Unemployment	Unemployment Rate (%)
<u>Bradford County</u>	30,600	29,200	1,400	4.7
<u>Sullivan County</u>	3,000	2,800	200	5
<u>Susquehanna County</u>	21,700	20,700	1,000	4.7
<u>Tioga County</u>	20,400	19,300	1,100	5.5
<u>Wyoming County</u>	14,500	13,700	800	5.4

Source: PA Dept of Labor and Industry

January 2009

Monthly Seasonally Adjusted Labor Force, Employment and Unemployment data in Multiple Counties for January, 2009. To see the most recent profile data click on the area name.

Area Name	Civilian Labor Force	Employment	Unemployment	Unemployment Rate (%)
<u>Bradford County</u>	31,400	29,000	2,300	7.5
<u>Sullivan County</u>	3,000	2,800	200	7.9
<u>Susquehanna County</u>	22,000	20,300	1,700	7.7
<u>Tioga County</u>	20,700	18,900	1,900	8.9
<u>Wyoming County</u>	14,500	13,500	1,100	7.4

Source: PA Dept of Labor and Industry

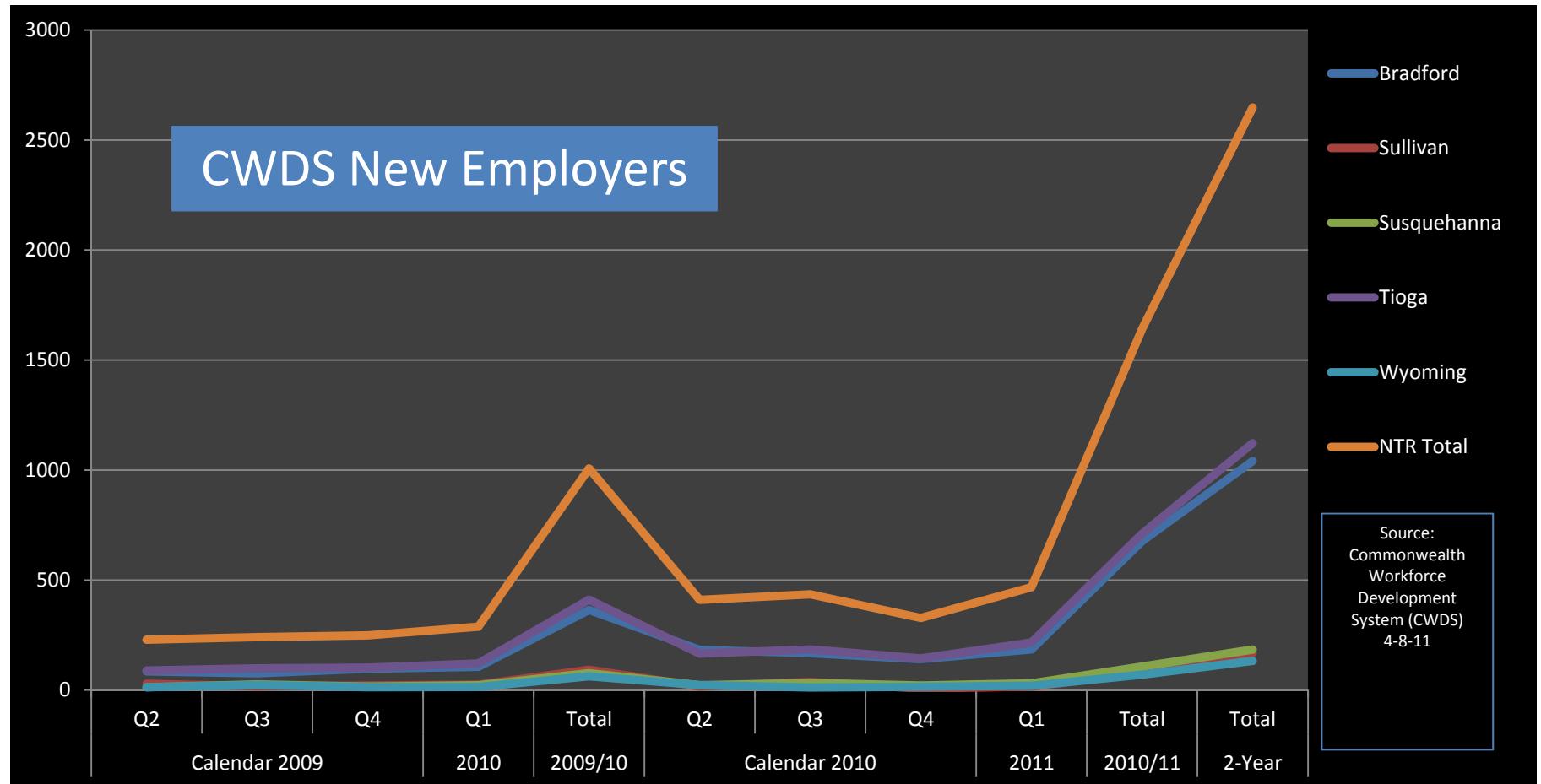
February 2011

Monthly Seasonally Adjusted Labor Force, Employment and Unemployment data in Multiple Counties(s) for February, 2011. To see the most recent profile data click on the area name.

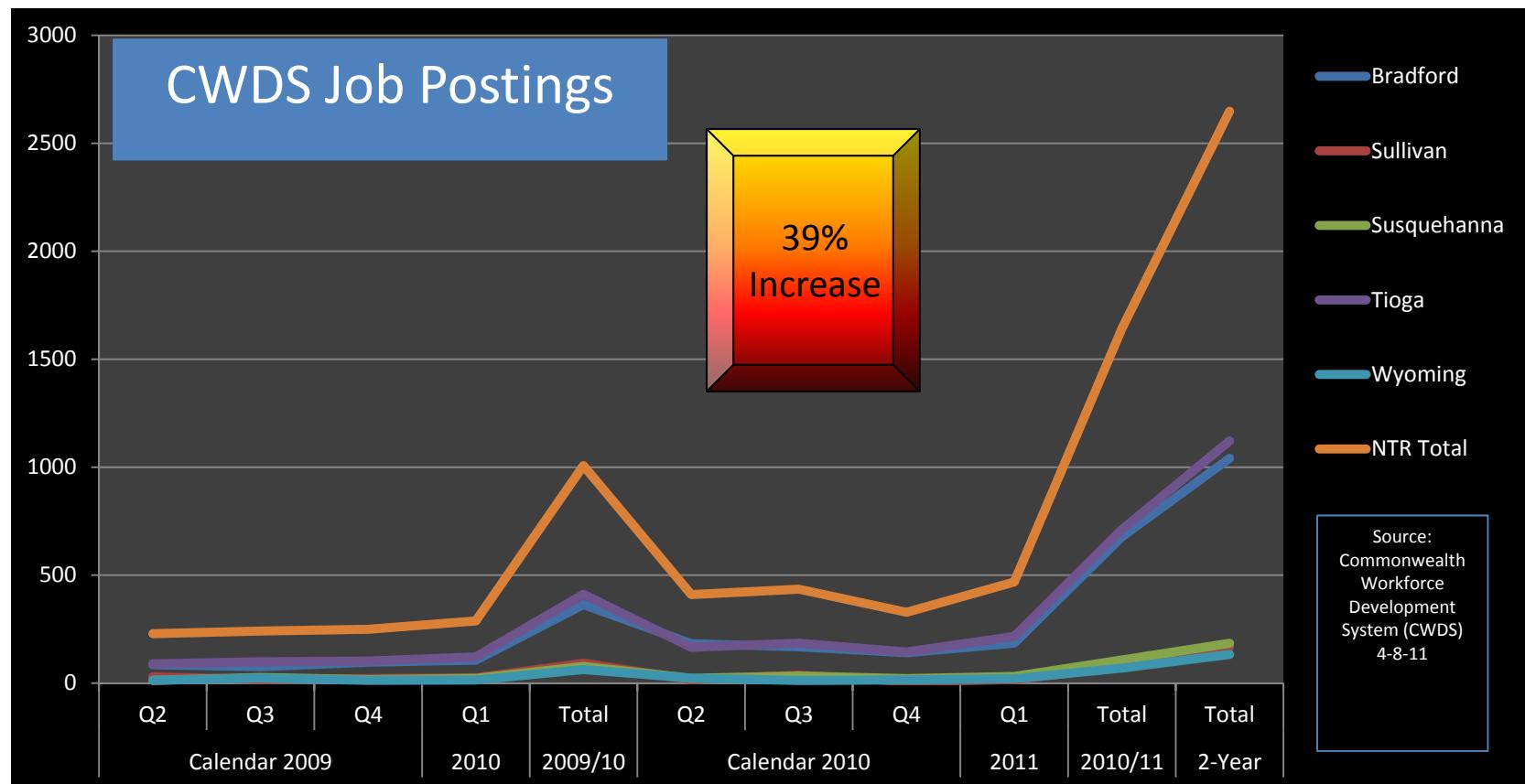
Area Name	Civilian Labor Force	Employment	Unemployment	Unemployment Rate (%)
<u>Bradford County</u>	33,400	31,700	1,700	5.1
<u>Sullivan County</u>	3,300	3,000	200	6.8
<u>Susquehanna County</u>	22,500	21,000	1,600	6.9
<u>Tioga County</u>	20,800	19,500	1,300	6.1
<u>Wyoming County</u>	14,500	13,100	1,400	9.4

Source: PA Dept of Labor and Industry

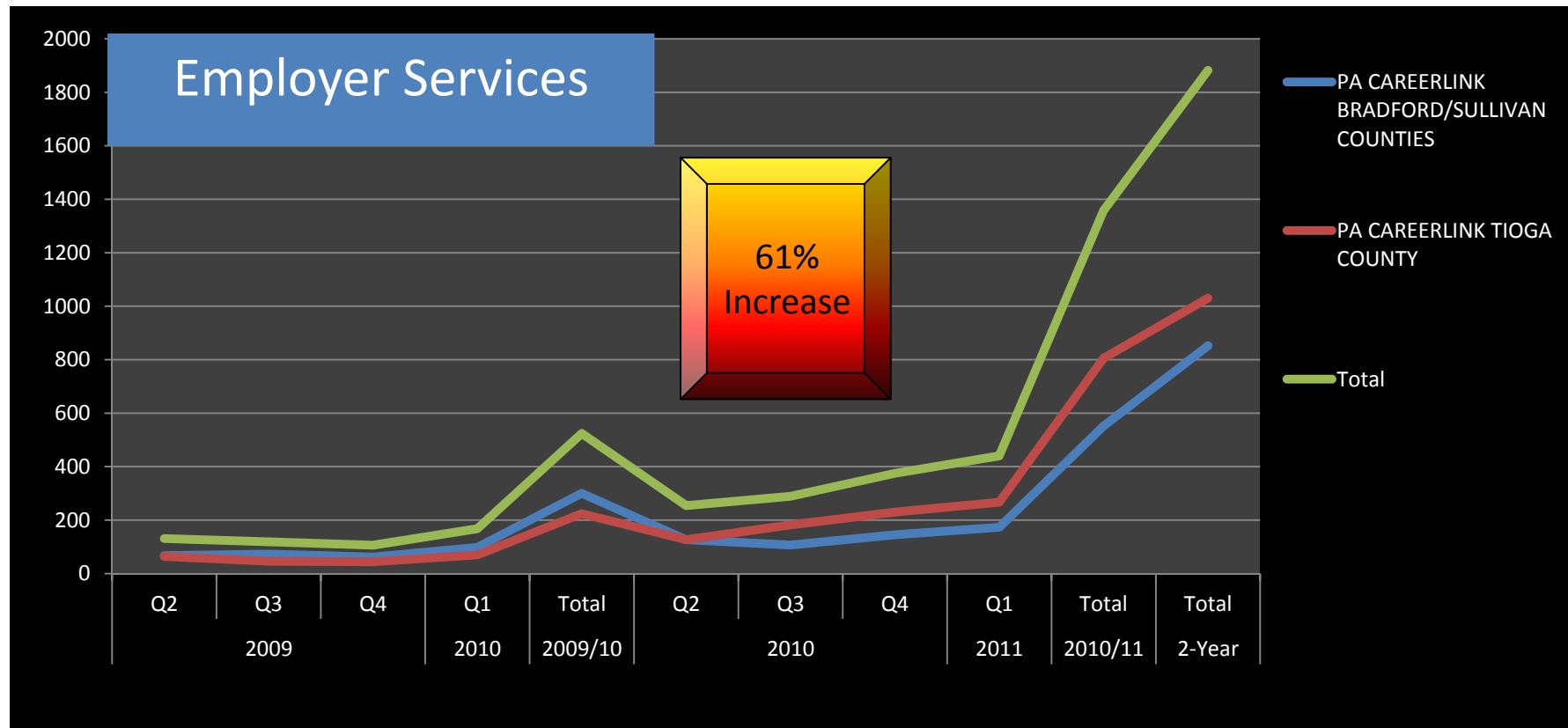
PA CareerLink – Northern Tier



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PA CareerLink – Northern Tier

- 79 companies related to the natural gas industry posting jobs on CWDS in the Northern Tier
- 216 postings
- 2305 job openings
- Job Fairs are being held onsite almost weekly

Bradford County

- Bradford County, at 5.1%, had the lowest unemployment rate in the Commonwealth in February.



Impact on local businesses

Services

Restaurants

Retail

Lodging

Fuel Suppliers

“Fit 4 Natural Gas”



Natural Gas Summit for Municipal Officials



Business to Business Natural Gas Expo





Land Use Control

Fewer than half of local Northern Tier governments have a municipal planning commission or a comprehensive plan.

Subdivision and land development ordinances are even less common.

This general lack of planning at a municipal level contributes to uncoordinated development, undesirable uses of land, and sprawl.

Local Municipality Challenges

- No uniform inventory of posted roads
- No inventory of posted bridges
- Traffic volume impacts unknown
- Oversized loads and coordination of permits when using local system

Impacts to Housing & Real Estate

- Supply vs. demand has doubled or even tripled rental prices and local residents cannot afford the increase
- Real estate property available for sale is at an all time low (subsurface rights are not included for those that are for sale)
- Appraisals of property have become difficult due to varying lease values



Transportation Impact

- Congestion
- Safety Concerns
- Heavy Hauling Permit Enforcement
- Uniform local Posting and Bonding/Permit Issuances
- Increases in traffic volume and truck traffic

“Traffic has increased on secondary roads from 150 vehicles a day to an additional 700 *trucks* per day”



Other Regional Impacts

- Municipalities challenged to manage more complex issues with less resources and expertise
- How to factor gas drilling in with long-term transportation plans?
 - Dynamics of operation
 - Changes in method of hauling water
 - Gathering lines and major pipelines
- Shale fracturing operations will continue long after drilling
- Other shale plays below Marcellus show promising opportunities







